



# SUPPLIERS

## User Manual





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# **ONBOARDING SUPPLIERS**

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## Introduction

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Identifying potentially new suppliers is a critical process for a purchasing organization. This process can leverage new suppliers' expertise and add value to the organization.

SRM simplifies the management of supplier candidates and ensures supplier onboarding decisions are robust, collaborative, and transparent.

There are several ways to add suppliers to the IVALUA database:

- Import through a custom interface with an external supplier repository (requires coding)
- Supplier self-registration
- Creation by an internal user

Once the ETL interface is configured, importing suppliers is an automated process. So, this section will focus on the last two methods and describe both processes.

## Supplier Self-Registration

The self-registration process generally begins with a communication from the purchasing department asking the supplier to click a hyperlink directing them to the IVALUA application homepage.

Self-registration can also be started from public RFPs published on the portal. These RFPs can be accessed by non-connected users who are required to self-register to participate. The process is similar.

### Self-Registration Process

Once on the IVALUA application homepage, new suppliers can launch the self-registration process by clicking the **New Supplier? Register Now** button. This will display the supplier registration form.

The screenshot shows the 'Supplier registration' form with the following sections and data:

- COMPANY INFORMATION**
  - Corporate Name \*: ACME
  - Doing Business as: ACME (en) »
  - Legal Form: Corporation / Incorporated (CORP, INC.)
  - Capital:
- POPULATE AT LEAST ONE OF THOSE FIELDS**
  - Gov't I.D.# (EIN, SIREN):
  - Tax Number:
  - DUN's: 526948563
  - ISIN:
- ADDRESS**
  - Address Label: Headquarters
  - Address Line 1: 300 David J Stern Walk
  - Address Line 2:
  - Zip Code \*: 95814 City \*: Sacramento
  - Country \*: UNITED STATES
  - State \*: California
- GOODS/PRODUCTS OFFERED**
  - Commodities:
    - Software
    - Hardware
    - Printers
    - Peripherals
    - Computers
    - Servers
    - IT Network / Infrastructure
    - IT
  - NAICS Code: 46.74A - Wholesale trade (business to business) hardware
  - Comment:
- REGIONS SERVED**
  - Europe
  - North America
- CONTACT INFORMATION**
  - First Name \*: Frank
  - Position \*: CEO (en) »
  - Password \*:
  - Confirm password \*:
  - Last Name \*: Noriega
  - Email \*: fnoriega@demo-acme.com
- SECURITY CONTROL**
  - 81B7 81B7

At the bottom of the form, there are links for 'Page', 'ID', 'VI', and 'C'. The footer indicates 'Buyer demo v6.154 ©'.

In this form, suppliers are prompted to provide information about:

- Their company, including an ID number such as a government ID, tax ID, DUNS number, or ISN
- The goods and services they offer and the regions they serve
- A contact, who will be granted access to the application

When done completing the form, suppliers must key in the *captcha* code and submit their registration request. Their request is then acknowledged by a message.



## Registration Approval Process

### Overview

Once the registration is submitted, an approval process is followed. The approval process is a workflow routine that can be configured to meet your specific business process, and generally begins with a step to confirm whether the supplier already exists. This confirmation step can be automated such that the new supplier can be created or rejected based on predefined criteria.

For example, the workflow can determine whether a supplier with the same tax ID or same name already exists, and if so, reject the entry and send an informational email notifying the person registering. Note: In this section, we describe the approval workflow as it is currently configured in the out-of-the-box solution.

If the registration workflow determines that the new entry is not a duplicate, the supplier is added to the supplier database, and the new supplier record is ready to go through the supplier activation process.

### Accessing and Processing Registration Requests on the Buyer's Side

Buyers can access submitted registration requests via the menu *Suppliers > Registrations*.

<
🔍
☆
Registrations
Search ...
🛒
🖨

Keywords: 
Alerts:  ...
Commodity:  ...
Status: 
Q Search
↩ Reset

		ID	Corporate Name	Created on	Status
x	🔍	REG000009	ACME	2/16/2017	Registration requested
x	🔍 ⚠	REG000004	Kalliope SA	6/28/2016	Rejected
x	🔍 ⚠	REG000003	Grainier	6/28/2016	Rejected
x	🔍	REG000002	FLAUR CONSULTING	6/28/2016	Supplier created
x	🔍	REG000001	PricewaterhouseCoopers	6/17/2016	Supplier created

5 Result(s)

[Page]
[D]
[M]
[C]
Buyer demo v8.154 ©

The registration request record shows the information posted by the supplier during the registration process.

Registration : ACME

Reject Validate Save Exit

COMPANY INFORMATION

Doing Business as : ACME Gov't I.D.# (EIN, SIREN) :  
Corporate Name : ACME Tax Number :  
Legal Form : Corporation / Incorporated (CORP, INC.) DUN's : 526948563  
Capital : ISIN :

ADDRESS

Address Label : Headquarters  
Address Line 1 : 300 David J Stern Walk  
Address Line 2 :  
Zip Code : 95814 City : Sacramento  
Country : UNITED STATES  
State : California

CONTACT INFORMATION

First Name : Franck  
Last Name : Noriega  
Position : CEO  
Email : fnoriega@demo-acme.com  
Contact : NORIEGA Franck (No login)

PROGRESS

Initialization Create No Yes Reject

STATUS

Status : Registration requested  
Level :

GOODS/PRODUCTS OFFERED

NAICS Code : 46.74A  
Comment :  
Commodities : Computers  
Hardware  
IT

REGIONS SERVED

Europe  
North America

[Page] [D] [V] [C] Buyer demo v8.154 ©

Review the data provided by the supplier. In particular, check whether the system has raised any alerts. Alerts can point to issues such as an already existing supplier ID (DUNS, ISIN, SIREN, Tax ID) or name, or contact on status 'Deleted' or 'Blocked' (these alerts are configurable and can be set to blocking or informational only). The overriding goal here is to ensure you do not create any duplicate supplier and that the person registering will be able to access the portal.

In the *Status* frame, you can assign a level to the supplier (if you don't, the level will automatically default to *Supplier Head-Office*).

When done, you can either **validate** or **reject** the registration request:



- Upon validation, the supplier record is automatically created in the Supplier Base. In the registration form, the status of the request changes to *Supplier Created* and a new field appears with a link to the supplier record.

STATUS

Status : Supplier created  
Level : Supplier Head-office  
Supplier : ACME

This supplier now exists in the IVALUA Supplier Base but still requires an internal approval before being activated.

- Rejected requests do not have a link to the supplier record. Instead, they show the reasons why the registration wasn't successful in the *Alerts* frame.

ALERTS
<div><div> - The contact is on status 'Deleted' or 'Blocked'</div><div> - Tax ID already exists</div></div>
STATUS
<div>Status : Rejected</div> <div>Level :</div>

## Supplier Creation by Internal Users

### Overview

An alternative route for feeding new suppliers into the Supplier Base is for internal users to create them directly in the repository.

When you create a supplier record, you can, of course, populate it yourself if you have the information at hand. However, an even more time-efficient method would be to have it done at the source by calling on the supplier to do it for you. This method involves the following steps:

- Creating the record
- Adding the supplier contact who will populate the record
- Generating a login for the newly created contact
- Transferring the record creation activity to the supplier contact

Read on for step-by-step instructions on how to perform these steps.

### Creating the Record

1. Go to Suppliers > (Browse Suppliers) Create.

The screenshot shows a web application interface for creating a new supplier. At the top, there is a navigation bar with a search bar and a 'Create' button. Below this, there is a sidebar with a user icon and a main content area. The main content area is divided into several sections: 'ALERTS', 'SUPPLIER INFORMATION', 'ADDRESS', 'PURCHASING INFORMATION', and 'SUPPLIER HIERARCHY'. The 'SUPPLIER INFORMATION' section contains fields for 'Code', 'Name \*', 'Corporate Name', 'Web Site', and 'Comment'. The 'ADDRESS' section contains fields for 'Address Label', 'Address Line 1', 'Address Line 2', 'Zip Code', 'City', and 'Country \*'. The 'PURCHASING INFORMATION' section contains fields for 'Catalog Access', 'Type', 'Typology', 'Incoterm', 'Incoterm Place', and 'Grouped orders'. The 'SUPPLIER HIERARCHY' section contains a 'Level \*' dropdown and checkboxes for 'Supplier Group' and 'Supplier Head-office'. At the bottom, there is an 'INFORMATION' section with a dropdown arrow. The footer of the page shows '[Page] [D] [V] [C]' and 'Buyer demo v8.154 ©'.

2. Input the name and country of the supplier (required fields).
3. Click **Save**.

## Adding the Supplier Contact who Will Populate the Record

1. Display the *Contacts* tab and click the **Create a contact** button.

The screenshot shows the 'Supplier ACME' interface. On the left is a sidebar with various tabs: Identity, Information, Contact (selected), Documents, Qualifications, Activity, Financial, Performance, Analysis, Service, Sustainability, Validation, and Changes log. The main content area has two tabs: 'SUPPLIER CONTACTS' and 'INTERNAL TEAM'. Under 'SUPPLIER CONTACTS', there are two buttons: 'Add an existing contact' and 'Create a contact'. The 'Create a contact' button is highlighted with a red rectangle and a red triangle points to it. At the top of the main content area, there are buttons: Exit, Save, Forward, and Submit for Due Diligence. A search bar is visible in the top right corner.

2. Fill in the required contact information and save.

The screenshot shows the 'Supplier contact management' form. At the top, there are buttons: Save, Save and close, and Close. The form is divided into two main sections: 'IDENTITY' and 'ADDRESS'. The 'IDENTITY' section contains fields for: Personal title (Mr.), Last Name (Carmichael), First Name (Josh), Email (j.carmichael@demo.acme.com), Phone, Cell Phone, Fax, Position (with a language dropdown set to 'en'), Status (Active), Internal Identifier, Default Language (French), and a Photo field with a 'Click or Drag to add a picture' instruction. The 'ADDRESS' section contains fields for: Address Label, Address Line 1, Address Line 2, Zip Code, City, Country (UNITED STATES), and State. A 'LOGIN INFORMATION' section is visible on the right side of the form.

## Generating Login Credentials for the Newly Created Contact

1. Click . The *Invite a supplier contact to login* window is displayed.
2. If needed, you can customize the pre-populated message.
3. When satisfied with the message, click **Send invitation**. A message is displayed to confirm that the invitation has been successfully sent to the supplier contact. Close the window.
4. In the *Supplier contact management* window, click the **Save and close** button.
5. In the *Contacts* tab, assign a role to the contact and click **Save**.

Label	Contact	Role
x Carmichael Josh	j.carmichael@demo.acme.com	x Supplier admin

## Transferring the Record Creation Activity to the Supplier Contact

1. Click the **Forward** button.

Supplier ACME

Exit Save **Forward** Submit for Due Diligence

Label	Contact	Role
x Carmichael Josh	j.carmichael@demo.acme.com	x Supplier admin

Email	Profile	Contact
bwindsor@clarity.corp	Responsible x (Supplier Management)	x WINDSOR Ben

2. In the window that pops up, select the supplier contact's name and click **Save & close**.
3. Click **OK** in the confirmation message box.

The supplier contact will be able to pick it up from there. They need to click the link provided in the notification email they will receive and login using the temporary password included in the email. They will be prompted to change their temporary password, and to read and accept the Terms & Conditions. After going through this process, they'll land on their homepage.

Note that when a supplier contact accesses the application, they'll use a dedicated portal. The Supplier Portal is a different access point than that for internal users.

The portal home page, like any other home page, can be configured by an Administrator. There is typically a welcome message with general information; user guides can also be posted to help users manage the application.

The screenshot displays the Ivalua Supplier Portal interface. At the top, a dark navigation bar features the 'CLARITY TURBO' logo on the left and a menu of options: General Info, Sourcings, Contracts, Catalogs, Orders, Invoicing, and Performance. On the right of this bar is a user profile for 'Tom R.' with a dropdown arrow. Below the navigation bar is a light gray header area containing a search bar and the text 'Supplier Portal'. The main content area is divided into several sections. On the left, a 'WELCOME' section with an orange header provides a message about logging in and includes contact information: 'contact@ivalua.com' and 'Phone : +1 545 454 XXXX'. To the right of the welcome message is a 'QUESTIONS FOR OUR BUYING DEPARTMENT ?' section featuring two contact cards. The first card for 'Melissa JONES' states she is the contact for invoice status, bank and tax information, and payment options. The second card for 'Louis LAW' states he is the contact for Technology purchasing, policy clarification, supplier capability questions, RFP and contracting. Below these sections is a row of four icons with labels: 'See my Information' (info icon), 'Create Receipt' (truck icon), 'Create Invoice' (invoice icon), and 'Import Catalog' (shopping basket icon). To the right of this row is a 'VALIDATIONS' section showing '3 All Pending Validations'. Below the icons are three summary boxes: 'REQUEST FOR INFO.' with '0 Pending Requests', 'INVOICES' with '10 Pending Invoices', and 'ORDERS' with '0 Order to Acknowledge'. At the bottom, a 'MANDATORY DOCUMENTS' section with a red header contains a warning icon and the text: 'There are mandatory missing documents : Please click here to add missing documents'.

To access their supplier record, supplier contacts must select *General Info. > My Company Information* from the main menu.

< ↻ ☆ Supplier ACME

Save

Identity

Information

Contacts

Documents

ALERTS

- DUNS number missing (Tab Information)

- Missing Mandatory Document(s)

BASIC COMPANY INFO

Status : Drafted

Name :

Corporate Name :  (en) ▾

Web Site :

Comment :

ADDRESS

Address Label :

Address Line 1 :

Address Line 2 :

Zip Code :  City :

Country : UNITED STATES ▾

State :  ...

PURCHASING INFORMATION

Catalog Access :

Incoterm :  ▾

Incoterm Place :

ADDITIONAL INFORMATION

Commodity :

Regions Served :

Comment (Supplier) :

CUSTOMER REFERENCES

Add a reference

The supplier record tabs and fields that supplier contacts have access to are configurable. In the standard application, suppliers can complete the following tabs: Identity, Information, Contacts, and Documents.

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## Collecting Required Data

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### Overview

Once the primary set of data is entered upon creation of the supplier record, you will need to further enrich the supplier's information.

The supplier record is not only composed of administrative data; it also includes a set of business data to help you manage your relationship with suppliers and better integrate them in the application.

The application offers a high flexibility in terms of defining which data are required, which data should trigger a warning when missing, and which data should go through an approval workflow.

In this section, we review how to populate the most salient types of business data:

- Supplier levels
- Supplier contacts
- Supplier scope / qualifications
- Services and skills offered
- Invoicing information
- Documents (credentials, certifications, and other documents)

You will find further information on these information types, as well as information types not covered in this section, in the Reference Guide (see p.82).

### Supplier Levels

#### Overview

To define the operational structure of the suppliers registered on its supplier portal, IVALUA uses a set of levels:


- Group
- Head Office
- Site
- ERP (this last level being reserved for handling suppliers imported from ERPs)

The specific set of tabs available in the supplier record can be adapted to the position of the supplier in its hierarchy. Likewise, application objects such as RFPs, contracts, or orders, are each linked to a specific level.

With this in mind, each supplier can be assigned one or more levels. Smaller suppliers, for instance, could hold multiple levels concurrently, while more complex groups can be organized into hierarchies. To create such hierarchies, you need to proceed in 2 steps:



- Assign supplier levels
- Define the hierarchical links between the suppliers who belong to the same hierarchy

#### Assigning Supplier Levels

1. Display the supplier record *Identity* tab.
2. In the *Supplier Hierarchy* section, select the desired level from the *Level* drop-down list. Repeat to assign more than one level. Use the *Delete* icon  to remove levels.
3. Click the **Save** button.

## Defining Hierarchical Links Between Suppliers

To create a hierarchy, you need to open each of the suppliers that are lower in the hierarchy and declare their parent supplier. The *Group* level being the highest level in the hierarchy, the *Parent* field is not available in supplier records that are declared as *groups*.

1. Display the supplier record *Identity* tab.
2. In the *Supplier Hierarchy* section, click the *Selector* button  placed next to the *Parent* field. The *Browse Suppliers* window is displayed.
3. Locate and select the desired parent supplier by clicking its *Select* icon .

To be selectable as a parent organization, suppliers must be declared on a supplier level that is above that of the child supplier (even though, in the case of multi-level suppliers, they might simultaneously be declared on the same level as the child supplier).

4. Click the **Save** button.

In the list of suppliers, the parent/child relationship is indicated in the *Parent* column.

The *Parent/Child* field shows the supplier hierarchy structure. The current supplier is displayed in bold characters. Each supplier in the hierarchy is a clickable link that will display the selected supplier in a secondary window.

SUPPLIER HIERARCHY



Level \*

x Supplier Head-office


x Supplier Site

Parent:

DELL, INC.

Parents / Child



SUP000149[ C001495 ] DELL, INC. UNITED STATESROUND ROCK

SUP000139[ C001489 ] DELL (cXML)

SUP000143[ C002452 ] DELL BRASIL

SUP000140[ C001490 ] DELL CANADACANADAOntario

SUP000144[ C002453 ] DELL CHILE

SUP000142[ C002451 ] DELL CHINA

SUP000146[ C001492 ] DELL GERMANYGERMANYFRANKFURT

SUP000141[ C002450 ] DELL INDIA

SUP000147[ C001493 ] DELL UKUNITED KINGDOMBerkshire

## Supplier Contacts

### Creating a New Supplier Contact

1. Display the supplier record *Contacts* tab.
2. Click the **Create a contact** button. The *Supplier contact management* window is displayed.

3. Fill in the Contact Sheet.
4. Click the **Save** button.

In the upper right corner of the window, the *Login information* area is now displayed and indicates that the current contact has no IVALUA user account (*No login*):

If the contact requires access to the supplier portal, you need to create an account for them.

5. To create a user account for the contact and send them their login ID and password, choose one of 2 methods:
  - Click to access the user account creation screen, assign a login ID and a password to the supplier contact, and then click **Save and close**.

Then click to access a messaging window and send the contact an invitation with their login credentials.


- The alternative method consists in using only this one last icon . This will create the user account, auto generate login credentials, and send the invitation in one single step. With this method, the contact's email address will be used as their login ID. A temporary password will be generated randomly.

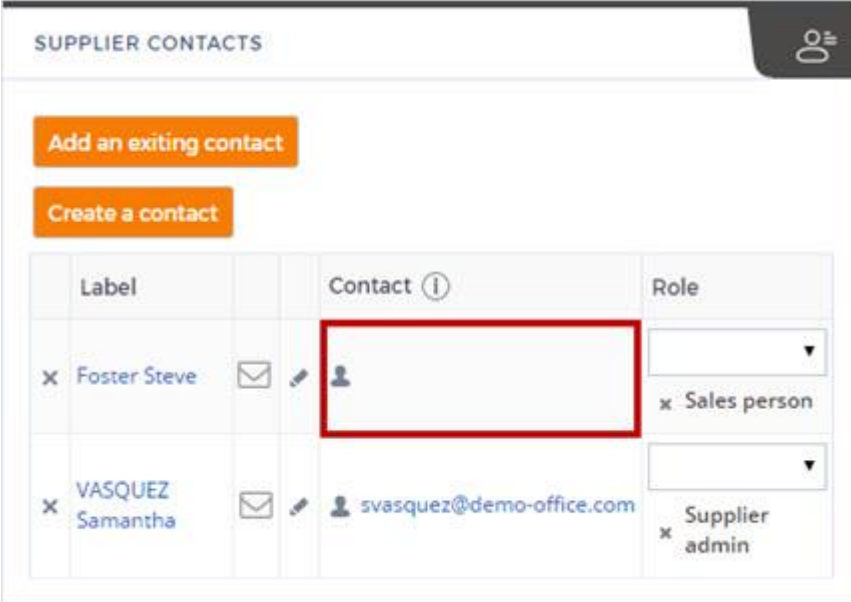
With both methods, a *Supplier* profile is automatically assigned to the contact.

6. Click **Save & close**.



In the *Contacts* tab, the contact's login ID is now displayed next to the *User Account* icon .

## Creating a User Account for an Existing Supplier Contact



A Supplier record may include contacts with no associated IVALUA user account (for people who do not need to access the supplier portal). In the *Contacts* tab, these contacts have no login ID displayed next to their user account icon .



The screenshot shows the 'SUPPLIER CONTACTS' interface. At the top, there are two orange buttons: 'Add an exiting contact' and 'Create a contact'. Below these is a table with the following columns: 'Label', 'Contact' (with an information icon), and 'Role'. There are two rows of contact data.

Label	Contact ⓘ	Role
x Foster Steve		x Sales person
x VASQUEZ Samantha	 svasquez@demo-office.com	x Supplier admin

In the first row, the 'Contact' field for 'Foster Steve' is highlighted with a red rectangle, showing a person icon without a login ID.

If at some point you want to give one such contact access to the supplier portal, you may use the icons  and  associated with the contact record in the same way as you would for a new contact (see p.19).

## Managing Multi-Supplier Contacts

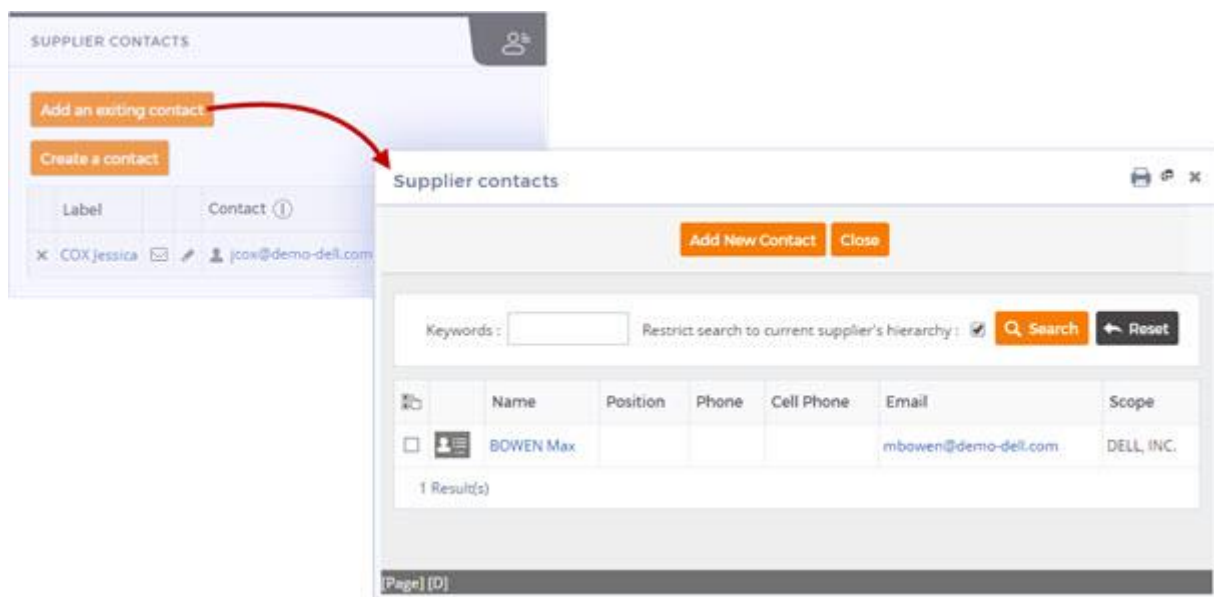
### Overview

There are cases when a single person may need to be referenced as a contact person for several suppliers that belong to the same supplier hierarchy. These contacts are referred to as *multi-supplier contacts*.

When logged on to the IVALUA portal, multi-supplier contacts can easily change the supplier on behalf of which they are logged on without having to log off (see *Supplier View – Changing Supplier*, page 23).

### Creating Multi-Supplier Contacts

To add to the current supplier record a contact that has already been created for another supplier record, use the button **Add an existing contact** in the *Contacts* tab: this will open the list of existing contacts that are accessible to the current supplier.



By default, the contacts listed are contacts:

- From parent suppliers (level immediately above and higher up)
- From child suppliers (lower levels)

To access other contacts, disable the search filter *Restrict search to current supplier's hierarchy*.

### Identifying Multi-Supplier Contacts

Multi-Supplier Contacts are easily identifiable in the *Contacts* tab of the Supplier record. The column *Other assigned suppliers* shows the name of other suppliers the contact is attached to.

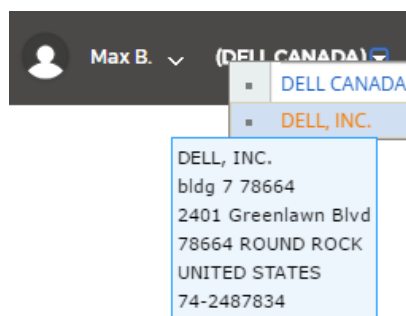
The number of displayed characters is limited; an ellipsis indicates that this number is exceeded; you may then display the full list of linked suppliers by hovering your mouse cursor over the table cell.

Label	Contact	Role	Other assigned suppliers
x BOWEN Max	mbowen@demo-dell.com	x Sales person	DELL, INC.
x COX Jessica	jcox@demo-dell.com	x Supplier admin	

### Supplier View – Changing Supplier

Multi-supplier contacts cannot access simultaneously the data of all the suppliers they are attached to. They are always connected on behalf of a given supplier; however, they can easily change suppliers.

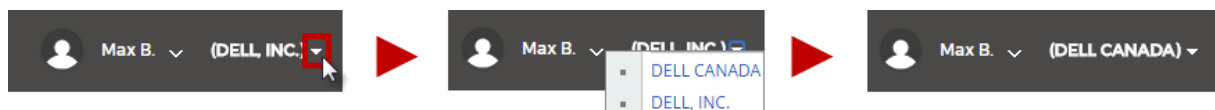
For multi-supplier contacts, a down-pointing arrow icon is displayed in the upper right corner of the navigation header. Clicking this arrow will display the list of the suppliers the contact is attached to. By hovering your mouse cursor over a supplier name, you can display a tooltip with additional information:



The tooltip includes the following information:

- Corporate Name
- Main Address (in the absence thereof, in order of priority, Payment Address, or Delivery Address)
- Supplier ID #: SIRET (in the absence thereof, in order of priority, SIREN, or TAX ID, or DUNS)

To toggle from one supplier to another, click the name of the desired supplier.



The name of the supplier you are currently connected on behalf of is displayed in parenthesis.

## Supplier Scope (Qualifications)

### Overview

The supplier scope indicates which organizations the supplier will be able to work with, the commodities they sell, and the approval status they receive for these.

The supplier scope is defined and managed in the *Qualifications* tab.

This same tab also includes *Geographical Coverage*, *Customer References*, as well as *Additional Information Declared by the Supplier*, which contains information the supplier provided during the registration process about the regions served and commodities offered.

To define the supplier scope, you —as an internal user— will use the qualification grid displayed in the upper part of the tab. The supplier scope is defined by adding “qualifications” which combine an organization and/or a commodity, and an approval status. This tab can be configured to require each new qualification to be submitted to a dedicated approval workflow.

### Access Rights

Editing qualifications requires the authorization *SUP – Edit authorization (auth\_sup\_approval\_manage)*.

### Requesting a Qualification Approval

1. Display the *Qualifications* tab of the supplier record.

Supplier 3M

Search ...

Exit Save

Commodity : ... Approved Status : Search Reset

Only my pending approvals : Organization : ...

+ Add a line + Add multiple qualifications Change history

	Organization	Commodity	Approved Status	New Status to Approve	Comment	Workflow
		Equipments	Forbidden	Ignored		Reject Approve
	Clarity Turbo	Direct	Approved			
	Clarity Turbo	Indirect	Approved			

3 Result(s)

GEOGRAPHICAL COVERAGE

Geographical area : ...

ADDITIONAL INFORMATION DECLARED BY THE SUPPLIER

Commodities :  
Comment (Supplier) :

CUSTOMER REFERENCES

Add a reference



2. To add a single qualification line, click the button **Add a line**. A blank row appears in the qualification list.

Organization	Commodity	Approved Status	New Status to Approve	Comment	Workflow
	Equipments	Forbidden	Ignored		Reject Approve
Clarity Turbo	Direct	Approved			
Clarity Turbo	Indirect	Approved			

3 Result(s)

To assign a qualification status to multiple organizations/commodities, click **Add multiple qualifications**.

Supplier approval - Creation

Supplier: 3M

Organizations:

Commodities:

New Status to Approve \* :

ADD A COMMENT

Comment

[Page] [D]

3. Select:
- The buying organizations and the commodities concerned (optional: if you do not select any organization/commodity, the approval will apply to the whole organizational/purchasing scope)
  - The status you want you want to apply to your selection

Single line:

Organization	Commodity	Approved Status	New Status to Approve	Comment	Workflow
Clarity Turbo	MRO		Approved		

Multiple lines:

4. **Save** to create the corresponding qualification line(s).

The system automatically creates one entry for each possible organization/commodity pair, depending on your selections.

Depending on your system configuration, new qualification lines may be effective at once, or may be subjected to an approval workflow (see page 27).

### Modifying or Deleting an Existing Qualification

1. Locate the qualification line whose status you want to change, then select the new status from the *New status to approve* drop-down list on the same row. To delete a qualification, select < To delete > in the status list.

<a href="#">+ Add a line</a> <a href="#">+ Add multiple qualifications</a> <a href="#">↺ Change history</a>							
		Organization	Commodity	Approved Status	New Status to Approve	Comment	Workflow
			Equipments	Forbidden	Ignored		<a href="#">Reject</a> <a href="#">Approve</a>
		Clarity Turbo	Direct	Approved	< To delete >		
		Clarity Turbo	Indirect	Approved			
3 Result(s)							

2. Click the **Save** button.

Depending on your system configuration, your modification may be effective at once, or may be subjected to an approval workflow (see page 27).



## Services and Skills

The **Services** tab allows you to select the services and skills offered by a supplier. When a request for professional services is issued as part of a sourcing process, this selection will serve to sift candidate suppliers in service requisitions.

To select services and skills, expand relevant items, select all appropriate checkboxes, and click save.

< ↺ ☆ | Supplier ABB

← Exit 💾 Save

### SERVICES

	Search
<input checked="" type="checkbox"/> Change Management Consulting	<input type="checkbox"/>
<input checked="" type="checkbox"/> Communication & Marketing Advisory	<input type="checkbox"/>
<input checked="" type="checkbox"/> Production	<input type="checkbox"/>
<input checked="" type="checkbox"/> Program Management	<input type="checkbox"/>
<input checked="" type="checkbox"/> Project Management	<input type="checkbox"/>
<input checked="" type="checkbox"/> Strategic Consulting	<input type="checkbox"/>
<input checked="" type="checkbox"/> Technical Consulting	<input type="checkbox"/>
Audit Consulting	<input checked="" type="checkbox"/>
Data migration consultation	<input checked="" type="checkbox"/>
Development and Configuration	<input checked="" type="checkbox"/>
Hardware environment monitoring	<input type="checkbox"/>
Hardware Outsourcing	<input type="checkbox"/>
Helpdesk	<input type="checkbox"/>
Network Outsourcing	<input type="checkbox"/>
Performance diagnostics	<input checked="" type="checkbox"/>
Performance sizing	<input checked="" type="checkbox"/>
Software environment change management	<input type="checkbox"/>
Software environment monitoring	<input type="checkbox"/>
Software Outsourcing	<input type="checkbox"/>
Technical Architecture	<input type="checkbox"/>
Technical Specifications, regression testing	<input type="checkbox"/>
<input checked="" type="checkbox"/> Training	<input type="checkbox"/>

### SKILLS

	Search		
<input checked="" type="checkbox"/> Functional skills (0)	Expertise	Normal	
<input checked="" type="checkbox"/> Technical skills (0)	Expertise	Normal	
Artificial Intelligence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Databases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
IT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Mainframe	<input type="checkbox"/>	<input type="checkbox"/>	
Multimedia	<input type="checkbox"/>	<input type="checkbox"/>	
Network	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PCs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Servers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Telecom	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Technological skills (0)	Expertise	Normal	

## Invoicing Information

### Declaring Supplier Banking Information

This area provides a space to declare the supplier's bank accounts to be used in the P2P process.

To declare a new set of banking information:

1. Display the supplier record *Invoicing* tab.
2. Click the **Add Banking Info** button.

The *Bank Information* window is displayed.

3. Enter the name of the financial institution.
4. Key in the corresponding bank and bank account identification numbers.

Here are some input guidelines:

- When keying in the IBAN, you must remove the spaces in the BBAN field.
- ABA is specific to the USA.
- RIB is specific to France. The RIB is automatically populated based on the IBAN when the IBAN country code is FR. The reverse is also true: if you enter the RIB, the IBAN will be auto populated.

5. You can set up several accounts for a supplier: use the *Default* box to designate the primary account.
6. Click Save and close.

## Declaring Supplier Payment and Accounting Information

Payment and accounting information sets can be defined per legal company and are used to default payment and accounting information in the P2P process. They include: payment type and terms, tax mode (self-assessment), third party accounts for current and fixed assets, and auxiliary account.

To declare a new set of payment and accounting info:

1. Display the supplier record *Invoicing* tab.
2. Click the Add Payment & Accounting Info button.


The *Payment Terms* window is displayed.

3. Fill in the fields. For detailed explanation of each field, see p.91.
4. Click Save & close.

The new *Payment & Accounting Information* set is now listed in the *Invoicing* tab.



## Documents

### Attaching Documents

1. Display the supplier record *Documents* tab.
2. Click the button **Add a document** in the desired category frame, or else click the *Add* icon  associated with the document type you wish to upload.




LEGAL DOCUMENTS ▾

Add legal documents

①	Att.	Type	Label	Validity begin date	Validity end date	Owner	Status	Validation Date	Notification Date	Request Date	Creation Date	Validity
		Certificate of Incorporation *										

1 Result(s)




The *Edit document* window is displayed.

Edit document : Legal Documents - Creation




Archive
Save
Save and close
Close

Document

Description

Validity :  
Compliance : Drafted  
Supplier : DELL BRASIL  
Type \* : Legal Documents / Certificate of Incorporation ▾  
Label :  
Validity begin date \* :   
Validity end date :   
Owner : DELEST Armelle ...  
Document :  Click or Drag to add a file

Comments






















Add a comment here

Follow up


Validation Date :  
Archive Date :  
Created :  
Request Date :  
Creation Date :  
Modified :  
Notification Date :

[Page] [D]

3. Fill in the fields, referring to the table below.

Field	Description								
Validity	<p>Document validity status in relation to its validity begin and end dates</p> <p>Auto-calculated and read-only</p> <p>Three possible validity statuses:</p> <div><div></div>Valid</div> <div><div></div>Impending expiry: the document has reached the alert delay defined for the document type</div> <div><div></div>Invalid: the document is not in its validity period (end date exceeded or begin date not reached)</div> <p>When the end date is exceeded, it will be displayed in red characters.</p> <table><tr><th>Validity end date</th><th>Validity</th><th>Status</th><th>Owner</th></tr><tr><td>1/31/2017</td><td></td><td></td><td>Aaron Bell</td></tr></table>	Validity end date	Validity	Status	Owner	1/31/2017			Aaron Bell
Validity end date	Validity	Status	Owner						
1/31/2017			Aaron Bell						
Compliance	<p>Document compliance status</p> <p>An approval workflow can be associated with each document type so that the buyer can approve the documents uploaded by the supplier in the portal. The document compliance status is displayed in the form of a visual indicator –red cross or green check mark) and is further specified in a tooltip:</p> <div><div></div>Compliant</div> <div><div></div>Being created, To be checked or Compliant</div> <p>When there is at least one non-compliant document, the supplier will be displayed with an overall non-compliant status in the supplier list.</p>								
Supplier	<p>Current supplier</p> <p>Auto-filled and read-only when the window is accessed from the Supplier record</p>								
Type	<p>Document types are configured by the Administrator.</p> <p>Through document type configuration, the Administrator can specify:</p> <ul style="list-style-type: none"><li>Which document types are <b>available</b> and which are <b>required</b>: these characteristics can vary based on country, commodity, organization, and other custom criteria. Required documents are always listed in their category even if no document has yet been uploaded for the corresponding type. Missing required documents are signaled with a red asterisk.</li></ul> <table><tr><th></th><th>Att.</th><th>Type</th></tr><tr><td></td><td></td><td>Certificate of Incorporation *</td></tr></table> <ul style="list-style-type: none"><li>Which documents should remain unique (<b>single document type</b>): Only one document of such a type should be valid at any time. If you attempt to validate a 2<sup>nd</sup> document, a non-blocking warning message will be displayed.</li></ul> <div><div>Confirm</div><div> Another single document already exists for this period. Do you want to continue recording?</div><div>ConfirmCancel</div></div> <ul style="list-style-type: none"><li><b>Validity duration</b>: The validity duration associated with a document type allows for automatic calculation of the validity end date based on the validity begin date.</li><li><b>Advance notification days</b>: number of days in advance of the expiry date that suppliers should be prompted to update a document.</li><li>Whether the document <b>conformity status is workflow-driven or selected manually</b>: for a given document type, a different workflow can be implemented per country, commodity, and/or organization.</li></ul>		Att.	Type			Certificate of Incorporation *		
	Att.	Type							
		Certificate of Incorporation *							
Label	Name of the document								



Field	Description
Validity begin date	These dates determine the document validity period.
Validity end date	The validity begin date is required.  The validity end date is auto filled based on the validity begin date and on the validity duration defined for the selected document type.
Owner	Defaulted to the user who adds the document
Document	Allows you to upload document files.  Document :  Click or Drag to add a file
Comments	Allows free text input for comments
Follow up	Auto filled and read-only follow up dates


- Click the **Save and close** button.

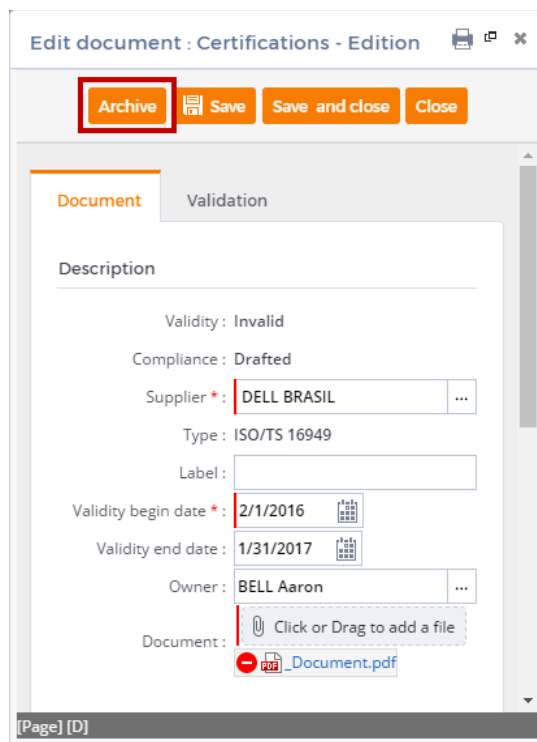
### Archiving/Unarchiving Documents

Documents whose validity date is exceeded can be archived.

By default, archived documents are not displayed in the *Documents* tab. To display these documents, select the checkbox *Display archived documents* in the filters area, and then click the **Search** button.

To archive a document:

- Click the *Edit* icon  of the document you wish to archive.  
The *Edit document* window is displayed.
- Click the **Archive** button available in the action bar.



A message will be displayed, that invites you to confirm your request.

- Click **OK**.

Once the document is archived, the **Archive** button is replaced by the **Unarchive** button.

## Activating a Supplier

Supplier activation is the process whereby you set up a company as an **approved supplier** after having ensured you can efficiently conduct business with that company.

Supplier activation is a necessary condition before a supplier becomes selectable in P2P and Sourcing processes.

To launch the supplier activation workflow in the out-of-the-box version, click **Submit for Due Diligence**.

Once submitted, the Supplier Record will be routed to all pertinent stakeholders who will carefully vet the data and documents.

The supplier activation workflow is configurable by an Administrator and can be modified to suit your business processes.

Supplier DOW Chemicals

Search ...

Exit

Save

Create a Change Request

Overview

Identity

Information

Invoicing

Contact

Documents

Qualifications

Scoring

Activity

Financial

Analysis

Service

Sustainability

Workflow

Changes log

Creation

Due Diligence

Site supplier?

no

AP Validation

AP Validation OK

Purchasing Validation

Documents accurate?

no

Documents waiting for approval

Documents OK

ADD A COMMENT

Comment

Click or Drag to add files

Send to:

Save

APPROVAL HISTORY

Activity	Name	Delegate to	Created on (your local time)	Validated on (your local time)	State	Initial performer
Purchasing Validation	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	○●●	ADMIN Clarity
Documents OK	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	○●●	ADMIN Clarity
AP Validation OK	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	○●●	ADMIN Clarity
Due Diligence	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	○●●	ADMIN Clarity
Creation	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	○●●	ADMIN Clarity

5 Result(s)

PREVIOUS APPROVALS & REFUSAL >

MAIL HISTORY >

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34

# **MANAGING SUPPLIER DATA**

---

## Controlling Changes to Supplier Data through Supplier Change Requests

---

### Change Requests

Supplier change requests are used to implement and manage a change process for supplier data.

When onboarding a new supplier, their data is reviewed and approved, and once the supplier is activated in IVALUA, their data becomes read-only.

- To update supplier records with an “Activated” status, users (Internal or Supplier) need to create a change request.
- A change request is a copy of the supplier record that has its own approval workflow.
- Once the change request is approved, modifications are committed to the original supplier record.
- Only one change request can ever be in progress at any given time; in the meantime, and until the change request is approved or canceled, the supplier record is locked.

Note that IVALUA can be configured to trigger an update of ERP data upon approval of a change request.

## Managing Supplier Change Requests

### Creating a Supplier Change Request

1. Go to the Suppliers / Browse Suppliers page.
2. Open the desired Supplier Record.
3. Click on **Create a change request**. This will display a new Supplier Change Request record (see p.41 for further information on the user interface).

Supplier change request: DOW Chemicals

Exit Save Cancel Submit for Approval

**CHANGE REQUEST**

Reason for change request :

**SUPPLIER INFORMATION**

Status : Initialized

Supplier under edition : SUP000150

External Code : C001635

Company Name : DOW Chemicals

Legal Name : DOW Chemicals

Web Site : http://www.dow.com/

Comment :

**ADDRESS**

Address Label :

Address Line 1 : 2030 Dow Ct

Address Line 2 :

Zip Code : 48674 City : Midland

Country : UNITED STATES

State/Province : Michigan

**PURCHASING INFORMATION**

Catalog Access :

Type : Partner

Typology : A

Incoterm :

Incoterm Location :

Group Orders :

**SUPPLIER HIERARCHY**

Level : Supplier Group  
Supplier Head-office  
Supplier Site

Parents / Child : SUP000150 [ C001635 ] DOW Chemicals UNITED STATES Midland

**TRACKING**

Created by DELEST Armelle on 2/2/2018 7:27:14 PM

#### Note

You can edit supplier Contacts and Documents without creating a change request.

If a change request is already ongoing for a supplier, a message is displayed in the Supplier Record sidebar and the record is locked until the ongoing request is approved or canceled (**Create a change request** button is unavailable).

Search ...

Subscribe Auto-hide >>

Missing Mandatory Document(s)

Change request in progress

Add a Message...

## Filling a Change Request and Submitting it for Approval

1. Indicate the reason for the change in the dedicated required field.

CHANGE REQUEST	
Reason for change request :	Address update (headquarters have moved)

2. Enter new data or write over existing data you wish to change in any of the available supplier data tabs (here *Identity*, *Information*, and *Invoicing*).
3. Save.
4. When all your changes are done, click **Submit for approval**.

This will launch the change request approval workflow and approvers will be notified. You'll have to wait until your change request is approved to see new values appear in the Supplier Record.

## Approving or Rejecting a Supplier Change Request

As an approver, you'll be notified by email whenever a new change request requires your approval.

1. Click the link provided in the notification email to directly access the change request.

Supplier change request: DOW Chemicals

Cancel Approve

CHANGE REQUEST	
Reason for change request : Address update (headquarters have moved)	
<b>SUPPLIER INFORMATION</b> Status : Approval in progress Supplier under edition : SUP000150 External Code : C001635 Company Name : DOW Chemicals Legal Name : DOW Chemicals Web Site : <a href="http://www.dow.com/">http://www.dow.com/</a> Comment :	<b>ADDRESS</b> Address Label : Address Line 1 : 1000 Main St Address Line 2 : Zip Code : 48674 City : Midland Country : UNITED STATES State/Province : Michigan
<b>PURCHASING INFORMATION</b> Catalog Access : Type : Partner Typology : A Incoterm : Incoterm Location : Group Orders : <input type="checkbox"/>	<b>SUPPLIER HIERARCHY</b> Level : Supplier Group Supplier Head-office Supplier Site Parents / Child : SUP000150 [ C001635 ] DOW Chemicals UNITED STATES Midland
<b>TRACKING</b> Created by DELEST Armelle on 2/2/2018 7:27:14 PM Modified by DELEST Armelle on 2/2/2018 7:40:28 PM	

[Page] [D] [M] [C] Buyer demo v8.156 ©

- Review the change request. To help you spot modifications, be sure to take a look at the *Changes log* tab, which points to changes and presents a side-by-side comparison of current values and new values. More on the *Changes log* tab, p.42.

Supplier change request: DOW Chemicals

Cancel Approve

Object	Old Value	New Value
Main Address		
Address Line 1	2030 Dow Ct	1000 Main St

2 Result(s)


[Page] [D] [V] [C] Buyer demo v8.156 ©




- Approve or cancel the change request using the dedicated buttons in the action bar.

Note: You can also cancel ongoing change requests from the Supplier Record (*Changes log* tab) by clicking on the **Cancel** button associated with the change request.




## Accessing Existing Supplier Change Requests



All supplier change requests (in any status) are listed in and can be accessed from the Supplier Record.

1. Open the Supplier Record.
2. In the *Changes log* tab, click the pencil icon  of a change request to open it.

Supplier DOW Chemicals

 Exit
  Save

Overview

Identity

Information

Invoicing

Contact

Documents

Qualifications

Scoring

Activity

Financial








Analysis

Service

Sustainability

Workflow

Changes log

Created on	Requester	Reason for change request	Status	Modified on	Approver	
 2/2/2018	Armelle DELEST	Address update (headquarters have moved)	Approval in progress	2/2/2018	Armelle DELEST	 
 1/22/2018	Armelle DELEST	Banking Info Update	Approved	1/22/2018	Armelle DELEST	
 1/22/2018	Armelle DELEST	Banking Info Update	Approved	1/22/2018	Armelle DELEST	
 6/28/2016	Emma Young	update of payment conditions and gov id.	Approved	6/28/2016	Emma Young	
 6/17/2016	Emma Young	New banking information received from supplier	Approved	6/17/2016	Emma Young	
5 Result(s)						

[Page] [D] [V] [C]

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## Getting Familiar With the User Interface

### Supplier Change Request

Supplier Change Requests are copies of editable Supplier Record tabs and fields where you can enter the edits you want to make in the Supplier Record. The change request comprises the following tabs:

- Supplier data tabs
- *Workflow* tab
- *Changes log* tab

On an ongoing change request, only the requester can edit data until the change request is submitted for approval.

### Supplier Data Tabs

Change requests only include the Supplier Record tabs and fields that are available for change. However, it is possible that certain read-only fields be displayed for information purposes.

To request changes to the Supplier Record, simply complete empty fields and/or type over existing data in editable fields.

## Changes Log Tab

The *Changes log* tab lists the fields that have been edited in the request and presents you with a side-by-side comparison of the current and new values.

This tab is not displayed to suppliers for confidentiality reasons because it's not possible to filter out from the logs data that is restricted to internal users only.

In the out-of-the-box version, all fields are tracked in the change request log.

The screenshot shows a web application interface for managing supplier change requests. The title bar indicates 'Supplier change request: DOW Chemicals'. Below the title bar are 'Cancel' and 'Approve' buttons. A left sidebar contains navigation links: Identity, Information, Invoicing, Workflow, and Changes log (which is highlighted). The main content area displays a table with the following data:

Object	Old Value	New Value
Main Address		
Address Line 1	2030 Dow Ct	1000 Main St
2 Result(s)		

At the bottom of the interface, there is a status bar with '[Page] [D] [V] [C]' on the left and 'Buyer demo v8.156 ©' on the right.

The change log grid displays the following information:

- **Object:** Field that has been edited
- **Old value:** Current value until the change request is approved
- **New value:** Value filled by the requestor

## Workflow Tab

The *Workflow* tab shows the progression of the change request within its approval workflow.

If needed, change request stakeholders can communicate with the requester by writing comments in the *Workflow* tab.

Supplier change request: DOW Chemicals

Cancel Approve

Identity Information Invoicing Workflow **Changes log**

```

graph LR
    Init[Initialization] --> APControl{AP Control?}
    APControl -- No --> Valid[Validation]
    APControl -- yes --> APValid[AP Validation]
    APValid --> Valid
  
```

ADD A COMMENT

Comment

Click or Drag to add files Send to: Save

APPROVAL HISTORY

Activity	Name	Delegate to	Created on (your local time)	Validated on (your local time)	State	Initial performer	
Validation	YOUNG Emma		2/2/2018 7:40:28 PM		○●○	YOUNG Emma	
Validation	NGO Catherine		2/2/2018 7:40:28 PM		○●○	NGO Catherine	
Initialization	DELEST Armelle		2/2/2018 7:27:14 PM	2/2/2018 7:40:28 PM	○○●	DELEST Armelle	re-visit step

3 Result(s)

PREVIOUS APPROVALS & REFUSAL >

MAIL HISTORY >

[Page] [D] [V] [C] Buyer demo v8.156 ©

## Browse Suppliers Page

When change requests are enabled, two columns dedicated to this feature are displayed in the *Browse Suppliers* page.

Company Name	City	Country	Qualification	Document Status	Document Validity	Score	Change request status	Locked
DOW Chemicals	Midland	UNITED STATES	Approved	✓	●	7.56	Approval in progress	<input checked="" type="checkbox"/>

- **Change request status:** Indicates the supplier change request status, if any. Possible values are:
  - ✓ Initialized: The change request has been created but has not yet been submitted for approval. The Supplier Record is locked.
  - ✓ Approval in progress: The change request has been submitted for approval. The change request becomes read-only for the requester. The Supplier Record is locked.
  - ✓ Approved: The change request has been approved and modifications have been committed to the original Supplier Record (which is now unlocked).
  - ✓ Canceled: The change request has been canceled (the Supplier Record is unlocked).
- **Locked:** Checkbox is checked when a change request is in progress. Supplier data are locked, which means you can't create a new change request until the current change request is over (approved or canceled).

Ongoing change requests can be instantly retrieved using the *Pending Change Requests* filter.

**Supplier Record: Change Request History**

The *Changes log* tab of the Supplier Record shows the supplier change request history.

Created on	Requester	Reason for change request	Status	Modified on	Approver	
2/2/2018	Armelle DELEST	Address update (headquarters have moved)	Approval in progress	2/2/2018	Armelle DELEST	<a href="#">Cancel</a>
1/22/2018	Armelle DELEST	Banking Info Update	Approved	1/22/2018	Armelle DELEST	
1/22/2018	Armelle DELEST	Banking Info Update	Approved	1/22/2018	Armelle DELEST	
6/28/2016	Emma Young	update of payment conditions and gov id.	Approved	6/28/2016	Emma Young	
6/17/2016	Emma Young	New banking information received from supplier	Approved	6/17/2016	Emma Young	

5 Result(s)

This grid displays the following information:

- ✎ : Access to change request detail
- Created on:** Date when the change request was initiated
- Requester:** Name of the user that created the change request
- Reason for change request:** Motive of the change request, refers to the field *Change request reason* populated by the user
- Status:** Status of the change request
- Modified on:** Date when the change request was last modified
- Approver:** Name of the user who approved the change request

Approvers can cancel ongoing change requests by clicking on the **Cancel** button.

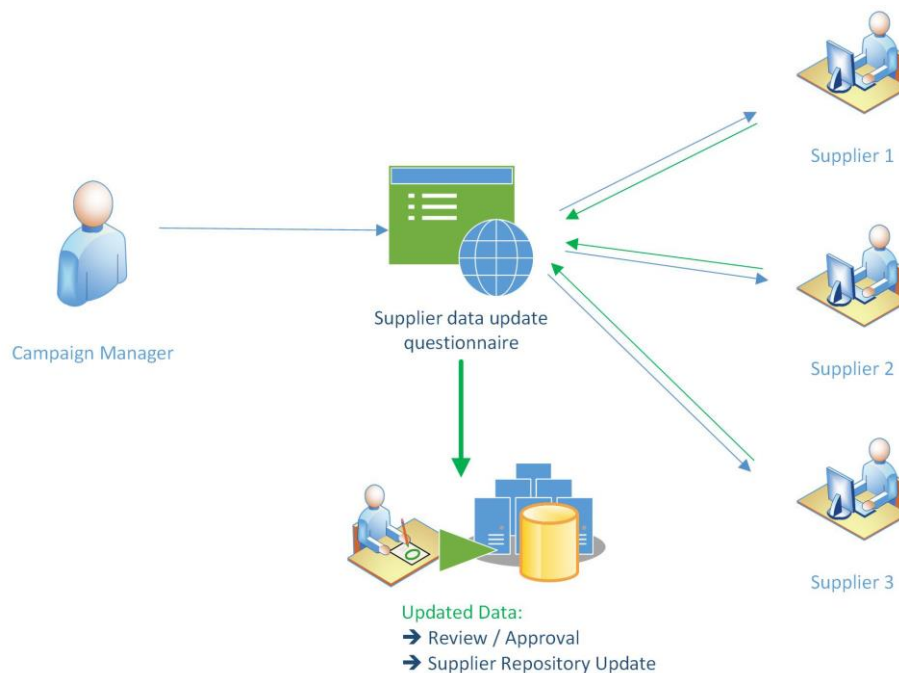
## Requesting Information From Suppliers

### Information Requests

Information Requests are a tool that lets you collect information from your suppliers.

Depending on your needs, you can include data links to the Supplier Base into your requests, which enables you to conduct supplier data update campaigns.

Supplier data update campaigns are **information collection** processes whereby you invite a selection of your suppliers to provide or update their company data. Field mapping capabilities between the questionnaire and the IVALUA database automate the tasks of prepopulating the questionnaire with known data, and then feeding collected data into the repository.



The steps necessary to conduct an information request campaign are described in this chapter:

- Selecting suppliers and initiating the campaign (→p.47)
- Editing the template (→p.49)
- Inviting suppliers to respond and tracking progress (→p.63)
- Reviewing supplier answers and updating the Supplier Base (→p.65)

## Selecting Suppliers and Initiating the Campaign

1. Go to the menu Suppliers / Browse Suppliers.
2. Use the search filters to narrow down the list of suppliers, and then select the checkbox of suppliers to be solicited for the campaign.
3. Click **Generate RFI** in the action bar.

If there is only one template available for supplier data campaigns, this will initiate the campaign;

If more than one questionnaire template is available, a contextual menu of available templates is displayed: select the desired template to initiate the campaign.

The screenshot shows a web application interface for creating a Supplier RFI campaign. The title bar reads 'Supplier RFI: Supplier Data Update'. Below the title bar are buttons for 'Save', 'Open for Answers', 'Duplicate Campaign', and 'Promote to Template'. The main form area is divided into two columns. The left column contains fields for 'Label' (pre-filled with 'Supplier Data Update'), 'Description', 'Type' (set to 'Supplier RFI'), 'Owner' (set to 'DELEST Armelle'), 'Organization', 'Commodity', 'Attached file' (with a 'Click or Drag to add a file' button), and 'Suppliers' (a list of suppliers: ACER AMERICA CORPORATION, ASUS, and DELL, INC., with a 'Clear all suppliers' button). The right column contains 'Begin Date' (11/28/2017), 'End Date', 'Autoclosure' (checkbox), 'Status' (Creation in progress), and a 'Progress' bar at 50%. Below the main form is a 'TRACKING' section showing 'Created on: 11/28/2017 10:53:17 AM by: DELEST Armelle'. The footer shows '[Page] [D] [V] [C]' and 'Buyer demo v8.156 ©'.

The campaign has the following characteristics:

- Its name (field *Label*) is defaulted with the name of the chosen questionnaire template.
- As the creator, you are set as the owner.
- Selected suppliers are listed under the *Suppliers* field.
- The *Begin Date* is set to the current date.

You can change these fields as needed. Other data is read-only:

- Questionnaire type
- Campaign status (set to *Creation in progress*)
- Progress bar. Note that the progress bar indicating the completion of the questionnaire will indicate a percentage other than zero if the chosen questionnaire template contains data links to the Supplier Base and questions have been pre-populated with existing data (more on data links: ➔ p.59).

4. Set the *End Date* of the campaign. By default, you need to close the campaign manually. If you want the campaign to be automatically closed upon reaching its end date, select the *Autoclosure* checkbox.

Note that suppliers may respond until the campaign is closed.

5. Save

Supplier RFI : Supplier Data Update

Save | Open for Answers | Duplicate Campaign | Promote to Template

Label : Supplier Data Update

Description :

Type : Supplier RFI Owner : DELEST Armelle

Organization : Commodity :

Attached file : Click or Drag to add a file

Suppliers : ACER AMERICA CORPORATION  
ASUS  
DELL, INC.

Clear all suppliers

Begin Date : 11/28/2017  
End Date : 12/15/2017  
Autoclosure : ☒  
Status : Creation in progress  
Progress : 50%

TRACKING

Created on : 11/28/2017 10:53:17 AM by : DELEST Armelle

At this stage, your campaign:

- includes a questionnaire, which you can view by displaying the Questionnaire tab
- may include default respondent assignment rules (if these were set up in the template), which you can view by displaying the Respondents tab

You can use the questionnaire and default respondent assignment rules as is or, if they do not meet your requirements, you can edit them (→p.49).



## Editing the Template

### Overview

Your questionnaire is displayed in the *Questionnaire* tab.

Download in Excel 2007-2010 format (xlsx)  
Download in Excel 97-2003 format (xls)

Drop here your questionnaire (in Excel format)  
Click or Drag to add a file

Preview Copy from... +

Type	Section/Question	Mandatory	Answers	Multi
Section	General information			
Text	Company name			
Text	Year of creation			
Section	Address			
Text	Address name			
Text	Address line 1			
Text	Address line 2			
Text	City			
Text	Zip Code			
Selector	State		State	...
Selector	Country		Country	...

11 Result(s)

A questionnaire is composed of three types of elements: questions, sections and sub-sections. These share a common setup popup window.

This setup window comprises two parts:

- Questionnaire Element: this is where you can display the type of questionnaire element (section, sub-section, or question), the section/sub-section name or question statement, and a description or hints directed to respondents. Additional options depend on the question type.
- Advanced (Constraints): this is used to add conditional behaviors to questionnaires based on respondents' answers.

(for further information on questionnaire settings, see **Settings Reference, p.57**).

To view the questionnaire as it will be displayed to respondents, click the **Preview** button.

You can keep your questionnaire as is, or complete it in one of the following ways:

- Copying an existing questionnaire (→p.50)
- Adding or editing questions, sections, or sub-sections by uploading a Microsoft Excel® file (→p.51) or using the IVALUA web UI (→p.55).

## Copying an Existing Questionnaire

You can re-use existing questionnaires. Existing questionnaires can either be templates configured by authorized users or questionnaires created in other supplier data update campaigns.

1. Click the **Copy from** button.

The pop-up window displays the available templates. To display the questionnaires created in other supplier data update campaigns, deselect the **Is a template** filter.

Configure Questionnaires

Close

Keywords: Type: Information Request Organization: Commodity: Search Reset

Status: Owner: Is a template: ☒

Campaign	Type	Organization	Commodity	Owner
GDPR Compliance	Information Request			U.S. ADMIN
Qualification Process	Information Request		Direct	U.S. ADMIN
Manufacturing Equipment - Engines & Gearbox	Information Request		Manufacturing Equipments	U.S. ADMIN
General Supplier Information	Information Request		Direct	U.S. ADMIN
Supplier Data Update	Information Request			U.S. ADMIN

5 Result(s)

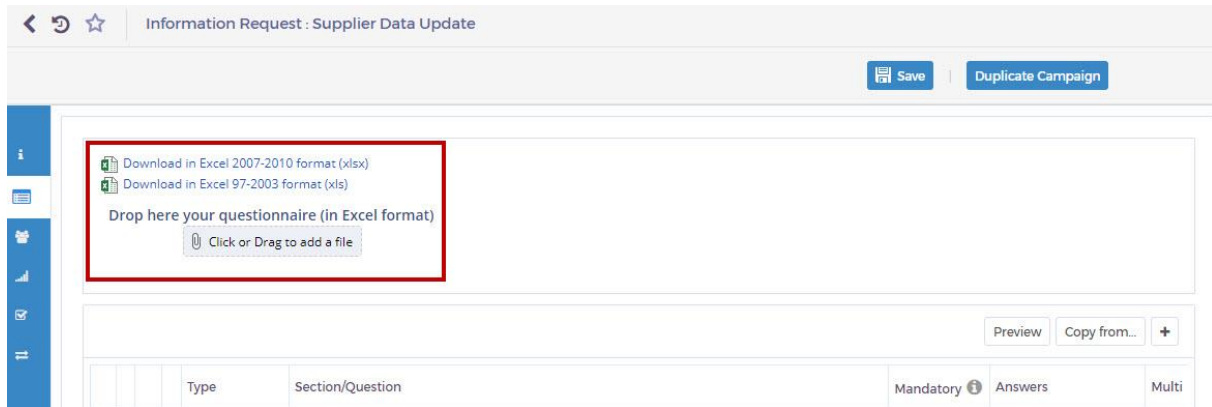
2. Select the desired questionnaire.

The questions are added to your campaign.

## Using a Microsoft Excel® File

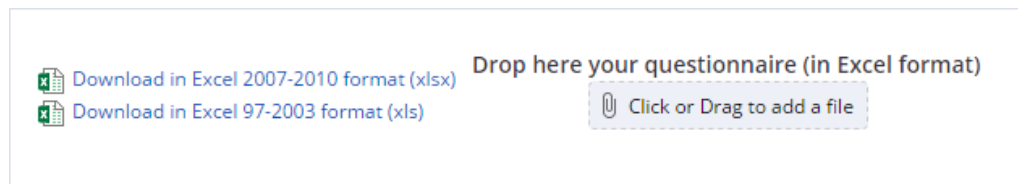
Editing the template questionnaire using Microsoft Excel® involves the following steps:

- Downloading the questionnaire: the purpose of this step is to download a file with existing questions from the template.
- Editing the questionnaire in Microsoft Excel®: You add or edit sections/subsections and questions in the downloaded Microsoft Excel® file.
- Importing the questionnaire: You upload the questionnaire in IVALUA.



### Downloading the Questionnaire in Microsoft Excel® Format

1. Display the *Questionnaire* tab.
2. Click the appropriate *Download in Excel Format* option, depending on the Microsoft Excel® version you are using.



The download process will vary depending on the web browser you are using.

3. Save the file to the desired location, and then open it in Microsoft Excel®.

### Adding or Editing Sections or Questions to the Microsoft Excel® File

The Microsoft Excel file includes several sheets (tabs):



- An “Instructions” sheet: contains guidance for using the file; we recommend that you peruse this tab
- A “Questions” sheet: contains all the questionnaire sections/subsections and questions
- A “Constraints” sheet that lists conditional behaviors associated with questions

This section will guide you through the creation and editing of questions and constraints.

## Questions

An easy way to figure out how to create the various types of sections, subsections, and questions, as well as set related options is to create test questions of each type, and then download the Microsoft Excel file.

A	B	C	D	E	F	G	H
Label	Description / Hints	Type	Display mode (answer)	Selector	Choices for answer	Mandatory Answer	A comment can be added to
1	MANDATORY INFORMATION FOR COMMODITY	Section				No	No
2	CONTROL	Sub Section				No	No
3	Do you have an equipped bench test ?	List of values	Buttons		YES=0 NO=0	Yes	No
4	Can you record engine power during test ?	List of values	Buttons		YES=0 NO=0	No	No
5	Can you record emissions during test ?	List of values	Buttons		YES=0 NO=0	No	No
6	Please Describe: which chemical element you record	Long text				No	No
7	Can you tune parameters during the test ?	List of values	Buttons		YES=0 NO=0	No	No
8	Please list which parameters can be tune	Long text				No	No
9	Can you record Engine temperature during test ?	List of values	Buttons		YES=0 NO=0	No	No
10	Can you record Gearbox temperature during test ?	List of values	Buttons		YES=0 NO=0	No	No
11	DOCUMENTATION	Sub Section				No	No
12	Can you provide complete test report with min/ max values ?	List of values	Buttons		YES=0 NO=0	Yes	No
13	Please describe standard summary of reports	Long text				No	No
14	Can you provide a complete manual for the use of the engine and the gearbox ?	List of values	Buttons		YES=0 NO=0	No	No
15	Select available language	List of values	Dropdown list		French=0 English=0 German=0 Spanish=0	No	No
16							

The table below describes the import file columns and gives instructions on how to fill them out:

Column	Description
<b>Label</b>	Name of the section/sub-section or actual question (free text)
<b>Description/Hint</b>	Further explanations or instructions to guide respondents
<b>Type</b>	Section, sub-section or question format type. To access available types, click the cell: an arrow will appear to the right of the cell; click the arrow and select a type from the list:
<b>Display mode (answer)</b>	(only if Question Type = List of values) Indicate how you want your choice list to be displayed. Possible values: Buttons, Dropdown list, Checkbox, Radio buttons, Stars
<b>Selector</b>	(only if Question Type = Selector) Name the selector to be displayed (e.g.: State, Country, Incoterm, etc.)
<b>Choices for answer</b>	(only if Question Type = List of values) List possible answers using the following syntax: Value=X, where "Value" stands for a possible answer and "X" is the number of points assigned to that answer (since multiple choice lists are not scored for Information Collection questions, assigned points will all be equal to zero) Example: Yes=0 No=0
<b>Mandatory answer</b>	Possible values: Yes/No "Yes" to set the question as required: respondents will not be able to submit the questionnaire unless they have answered all required questions.
<b>A comment can be added to clarify the answer</b>	Possible values: Yes/No "Yes" to add a comment area that will allow the respondent to attach comments to his response, or "No" to discard the comment area.

<b>Column</b>	<b>Description</b>
<b>File can be attached to the answer</b>	Possible values: Yes/No "Yes" to add a file upload area that will allow respondents to attach a file to their response, or else type "No" to discard the file upload area.
<b>Multiples answers allowed</b>	Possible values: Yes/No "Yes" to allow respondents to choose more than one answer to the question
<b>Mapping</b>	Name of the database column the question is mapped to. This mapping enables you to update the IVALUA Supplier Base with data coming directly from suppliers.

### Constraints

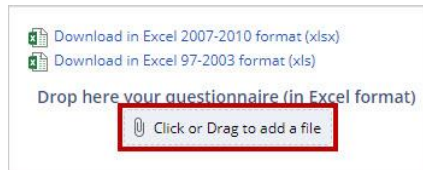
Section	Question	Operator	Value	Section Result	Result	Constraint type
MANDATORY INFORMATION FOR COMMODITY	Can you record emissions during test ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please Describe which chemical element you record	is visible
MANDATORY INFORMATION FOR COMMODITY	Can you tune parameters during the test ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please list which parameters can be tuned	is visible
MANDATORY INFORMATION FOR COMMODITY	Can you provide complete test report with min/ max values ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please describe standard summary of reports	is visible
MANDATORY INFORMATION FOR COMMODITY	Can you provide a complete manual for the use of the engine and the gearbox ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Select available language	is visible

The table below describes the columns from the *Constraints* tab:

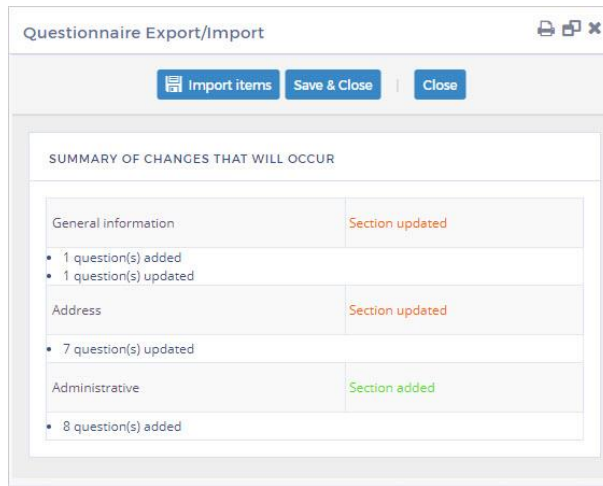
<b>Column</b>	<b>Description</b>
<b>Section</b>	Name of the section (tab) that contains the question to evaluate
<b>Question</b>	Question whose response will be evaluated
<b>Operator</b>	Comparison operator: <i>Is equal to</i> , <i>Is not equal to</i> , <i>Contains</i> , etc. Available operators depend on the type of question.
<b>Value</b>	Value the response will be evaluated against
<b>Section Result</b>	Name of the section (tab) that contains the question affected
<b>Result</b>	Affected question
<b>Constraint type</b>	Behavior if the condition evaluates to true

### Uploading the Microsoft Excel® Questionnaire Back Into IVALUA

1. Drop the Microsoft Excel® questionnaire file on the file upload area, or click this area and select the file.




The *Questionnaire Export/Import* window will be displayed. This screen presents a list of found errors and gives a summary of the sections, sub-sections and questions that will be imported.

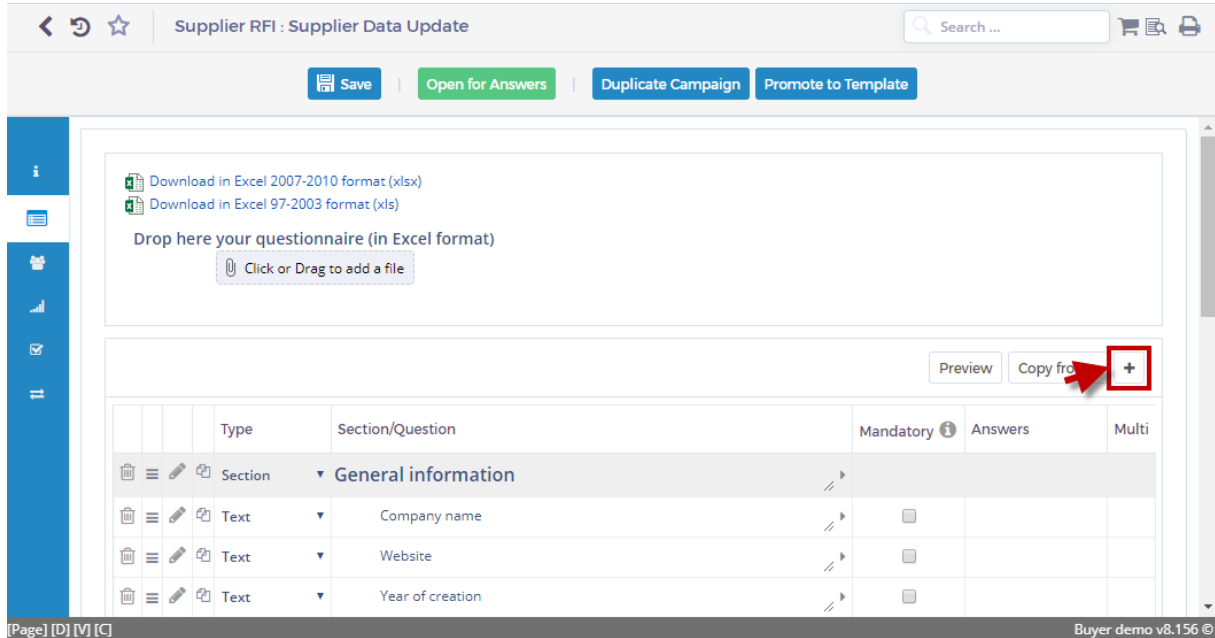


2. Click **Save** to import the questionnaire. A message will indicate that the import was successful.
3. Click **Close** to go back to the *Questionnaire* tab and view imported questions.

## Adding and Editing Questions and Sections Using the IVALUA Web UI

### Adding a New Question or Section

1. Display the *Questionnaire* tab.
2. To create either a new section, sub-section, or question, use the *Plus Sign* icon .



A new row is added to the question grid below.

3. In the *Type* column, select whether you want to create a section, sub-section, or one of the following question formats: Text, Long Text, Numeric, Date, Attachment, Selector, or List of values.

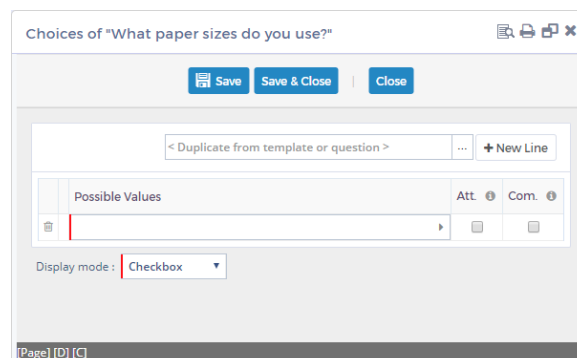
In the *Section/Question* column, enter the section/sub-section title or the question statement if it's a question.

4. Click the **Save** button in the action bar.
5. If it's a question, more settings will become available upon saving, namely the *Mandatory*, *Answers* and *Multi* columns.

- Use the *Mandatory* column to indicate whether respondents are required to answer the question.
- Activate the *Multi* checkbox to allow more than one answer.

If your question is either a selector or a multiple-choice question (list of values), you need to provide further information in the *Answers* column:

- For a selector, choose the selector to be displayed.
- For a multiple-choice question, click **Add values** to access a screen that will allow you to create a choice list for possible answers:



To create your answer choice list, you can either:

- ✓ **Select an existing list from the choice list selector** (labeled *Duplicate from template or question*): this selector allows you to copy a choice list from another question in the current questionnaire or from a template, or
- ✓ **Enter each answer choice** in the *Possible Values* column (using the **New line** button to add new rows).

Choose how you want possible answers to be displayed from the *Display Mode* drop-down list.

Save & close.

6. Information Collection questionnaires allow you to set up conditional behaviors based on respondent's answers.

Possible conditional behaviors include the ability to skip or display questions and the ability to set a question, a comment, or a file attachment as required, all based on respondents' answers.

To set up such a behavior, go to the *Advanced* section of question settings.

Conditional behaviors always involve two questions: the question whose response is being evaluated and the question that will be affected if the condition is met.

You can set up the desired conditional behavior from either of the two questions involved, using either of the sections *Constraint TO this question* or *Constraint FROM this question*:

- **Constraint TO this question:** The current question is the affected question, in other words, the question that will show the result of the condition being met
- **Constraint FROM this question:** The current question is the question whose response will be evaluated to induce a result

Let's illustrate this with a simple example. Let's imagine you want to ask your suppliers whether they provide a manual and, if so, to specify the available languages for the manual.

Q14 – Do you provide a manual?

Q15 – Select languages.

You want to display Q15 only if the answer to Q14 is YES.

If you set up the conditional behavior in Q14, you will create a FROM constraint like so:

Constraints from this question

Question	Operator	Value	Result	Constraint type
if[Q14] Do you provide a manual?	is equal to	YES	... then Select languages	... is visible

1 Result(s)

If you set up the conditional behavior in Q15, you will create a TO constraint like so:

Constraints to this question

Question	Operator	Value	Result	Constraint type
if Do you provide a ma	is equal to	YES	... then[Q15] Select languages	is visible





1 Result(s)

Whichever way you choose to set it up, the constraint is mirrored in the other question involved.



## Other Operations on Questions or Sections

Each row in the questionnaire is associated with a set of icons, which allow you to perform the following actions:

Icon	Description
	Delete a row
	Move a question up or down (click and drag)
	Edit the settings of a question, sub-section, or section
	Duplicate a question

## Settings Reference

Column	Description
<b>Questionnaire Element</b>	
<b>Type</b>	Question format type
<b>Label</b>	Question statement or section/sub-section title
<b>Description / Hints</b>	Clarification or guidance instruction on how to respond
<b>(File attachment control)</b>	Use this control to attach a file for respondents to review
<b>Mandatory Answer</b>	Answering questions is optional unless you enable this option.
<b>A comment can be added to clarify the answer</b>	Select this check box to allow respondents to include additional explanations with their answer.
<b>Multiple answers allowed</b>	Select this check box to allow respondents to select more than one answer.
<b>File can be attached to the answer</b>	Enable this option to allow respondents to include a file attachment with their answer
<b>Linked with the field</b>	Use this field to link the question to an IVALUA database field. This is useful to prepopulate known data and to update the Supplier Base with collected information. See also: <i>Managing Data Links With the Database</i> , on p.59
<b>Questionnaire Element</b>	<b>'List of values' question type only</b>
<b>Duplicate from template or question</b>	Use this selector to select a predefined answer choice list. The answer choices of the selected list are listed in the <i>Possible Values</i> grid.
<b>+ New Line</b>	When entering answer choices manually, use this button to add a new answer choice.
<b>Possible Values</b>	Answer choice
<b>Att.</b>	Enable this option to require respondents to attach a file if they select this answer

Column	Description																				
Com.	Enable this option to require respondents to include a comment if they select this answer																				
Display Mode	Select the format you want answer choices to be displayed in																				
Advanced																					
Constraints TO this question / Constraint FROM this question	<div><div>ADVANCED</div><div><div>Constraints to this question</div><div><table><thead><tr><th>Question</th><th>Operator</th><th>Value</th><th>Result</th><th>Constraint type</th></tr></thead><tbody><tr><td> if <input type="text"/></td><td> is equal to </td><td><input type="text"/></td><td>then [Q22] test</td><td>is visible </td></tr></tbody></table></div><div>Constraints from this question</div><div><table><thead><tr><th>Question</th><th>Operator</th><th>Value</th><th>Result</th><th>Constraint type</th></tr></thead><tbody><tr><td> if [Q22] test</td><td> is equal to </td><td><input type="text"/></td><td> then </td><td> is visible </td></tr></tbody></table></div></div></div> <div>Use this section to add conditional behavior based on respondents' answers (skip logic, setting a question, a comment or a file attachment as required).</div> <div><b>Constraint TO this question</b> → Current question is the affected question, in other words, the question that will show the result of the condition being met</div> <div><b>Constraint FROM this question</b> → Current question is the question whose response will be evaluated to induce a result</div>	Question	Operator	Value	Result	Constraint type	if <input type="text"/>	is equal to	<input type="text"/>	then [Q22] test	is visible	Question	Operator	Value	Result	Constraint type	if [Q22] test	is equal to	<input type="text"/>	then	is visible
Question	Operator	Value	Result	Constraint type																	
if <input type="text"/>	is equal to	<input type="text"/>	then [Q22] test	is visible																	
Question	Operator	Value	Result	Constraint type																	
if [Q22] test	is equal to	<input type="text"/>	then	is visible																	
Question	Question whose response will be evaluated																				
Operator	Comparison operator: <i>Is equal to</i> , <i>Is not equal to</i> , <i>Contains</i> , etc. Available operators depend on the type of question.																				
Value	Value the response will be evaluated against																				
Result	Affected question																				
Constraint type	Behavior if the condition evaluates to true																				

## Managing Data Links With the Database

Data links are used for prepopulating the questionnaire that is sent out to solicited suppliers with known data and for updating the Supplier Base with suppliers' answers.

### Principle

Each RFI question can be tied to a Supplier Base field.

Data links are bidirectional:

- Base → Questionnaire: the link is used for prepopulating the questionnaire with existing data from the Supplier Base.
- Questionnaire → Base: the link is used for updating the Supplier Base with suppliers' responses to the questionnaire.

### Creating or Editing Data Links

1. Open the question you wish to link to the database.
2. Using the *Linked with the field* selector, select the Supplier Base field you wish to link it to.

Question : Company name

Save Save & Close Close

QUESTIONNAIRE ELEMENT

Type : Text

Label : Company name

Description / Hints :

Mandatory Answer : ☐

Click or Drag to add a file

A comment can be added to clarify the answer : ☐ File can be attached to the answer : ☐

Linked with the field : Supplier Name

ADVANCED

Constraints to this question

Question	Operator	Value	Result	Constraint type
----------	----------	-------	--------	-----------------

Constraints from this question

Question	Operator	Value	Result	Constraint type
----------	----------	-------	--------	-----------------

[Page] [D] [C]

3. Save and close.

## Assigning Respondents

### Overview

Respondents can be assigned either using rules or manually. When you have a lot of assignments to do, a good practice is to use rules to cover most cases, and then to handle manually any supplier for whom the rules did not bring up any respondent.

DEFAULT RESPONDENTS RULES

For : All selected objects ... Assign : A respondent ... Or : A role ... + Add the Rule Re-execute Rules

Supplier Contacts will answer for All suppliers

Keywords : Users : Missing respondents : Search Reset

Suppliers	Respondents
ABB	Bob BENNETT
AEG	
BASF	John ANDREWS
DOW Chemicals	Tom REYNOLDS
Manutan	Alexander MATTHEWS
Siemens	Louis GORDON

6 Result(s)

This is where you set up rules

This is where you perform manual assignments

The campaign template can include default respondent assignment rules. If so, you can use those rules or create new ones. If the campaign template does not include any rule, then you should create your own.

Once assignment rules are applied, make sure every supplier has been assigned a respondent and fill out any missing respondent (→p.62).

## Creating Respondent Assignment Rules

### Before You Begin

When creating assignment rules, you need to be aware of the following points:

- There can be only one respondent per supplier.
- You can define multiple respondent rules. The rules will be applied in the order they are defined until a respondent is found for each supplier (only one respondent will be selected in the end).
- Respondents can be assigned by name or by role.  
In the first case, you select the specific user who will respond. This requires you to know the user by name.  
In the second case, you select a role and the system finds the relevant users. In the context of information requests to suppliers, only the *Supplier Contacts* role is relevant. It returns the list of all the contacts declared for each supplier. The system assigns the first contact found for each supplier.

## Creating a New Rule

DEFAULT RESPONDENTS RULES

For : All selected objects ... Assign : A respondent ... Or : A role ... [+ Add the Rule](#) [Re-execute Rules](#)


**Supplier**      **Supplier Contact**      **Role**

### Assignment by name:

1. Select a supplier.
2. Select a supplier contact.
3. Click Add the Rule.

### Assignment by rule:

1. (Optional) Select a supplier only if you want to limit the rule to a given supplier. Leave this blank to apply the rule to all suppliers.
2. Select a role.
3. Click **Add the Rule** to create the rule.

If you have multiple rules, you can reorder them by hovering your mouse pointer over the icon , and then dragging the rule to the desired position.

Rules are applied as they are created.





The names of assigned respondents are displayed in the Suppliers/Respondents grid located below respondent rules.

Supplier RFI: Supplier Data Update

[Save](#) | [Open for Answers](#) | [Duplicate Campaign](#) | [Promote to Template](#)

DEFAULT RESPONDENTS RULES

For : All selected objects ... Assign : A respondent ... Or : A role ... [+ Add the Rule](#) [Re-execute Rules](#)

		Supplier Contacts (supplier scoring) will answer for All suppliers
		Supplier Internal Responsible will answer for All suppliers

Keywords :  Users :  ... Missing respondents : ☐ [Search](#) [Reset](#)

Suppliers	Respondents
ACER AMERICA CORPORATION	Aaron BELL
ASUS	
DELL, INC.	Max BOWEN
HEWLETT PACKARD COMPANY	Romeo MITCHELL
4 Result(s)	

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## Filling In Missing Respondents

In the Suppliers/Respondents grid, you can spot missing respondents either by scanning through the list or, if you have a long list of suppliers, by selecting the *Missing Respondents* filter, and then clicking **Search**.

For these suppliers without respondent, you can click the supplier name to access the Supplier Record and create a supplier contact (*Contacts* tab).

For suppliers with multiple contacts, you can change the respondent assigned by a rule to another of the supplier's contacts by clicking directly in the respondent cell and using the selector that appears.

Suppliers	Respondents
ACER AMERICA CORPORATION	BELL Aaron ...

## Inviting Supplier Contacts to Respond and Managing the Ongoing Campaign

### Inviting Supplier Contacts to Respond

Click **Open for Answers**.

Solicited supplier contacts will receive an email notification inviting them to respond. The email notification includes a clickable link to the questionnaire.

### Tracking Progress

You can monitor completion of the campaign on the *Answers* tab.

Note that progress rates account for data that is prepopulated directly from the Supplier Base using data links between questions and supplier base fields.

Supplier RFI: Supplier Data Update

Buttons: Save, Terminate, Duplicate Campaign, Promote to Template

Search: Supplier: [ ] Status: [ ] Search [X] Reset [X] Send Reminders [X]

Questionnaire survey	Respondent	Supplier	Progress	Status	Last reminder (your local time)
Supplier Data Update	McCarthy Ian	ASUS	33%	In progress	
Supplier Data Update	Bell Aaron	ACER AMERICA CORPORATION	33%	In progress	
Supplier Data Update	BOWEN Max	DELL, INC.	72%	In progress	
Supplier Data Update	Mitchell Romeo	HEWLETT PACKARD COMPANY	61%	In progress	

4 Result(s)

[Page] [D] [V] [C] Buyer demo v8.156 ©

### Sending a Reminder to Late Respondents

On the *Answers* tab, select the check box of the respondents you wish to send a reminder to, and then click **Send Reminders**. Selected respondents will receive an email notification.

The date and time the reminder is sent is logged in the *Last reminder* column.

Supplier RFI: Supplier Data Update

Buttons: Save, Terminate, Update Suppliers data, Duplicate Campaign, Promote to Template

Search: Supplier: [ ] Status: [ ] Search [X] Reset [X] Send Reminders [X]

Questionnaire survey	Respondent	Supplier	Progress	Status	Last reminder (your local time)
Supplier Data Update	McCarthy Ian	ASUS	33%	In progress	12/7/2017 11:57:38 AM
Supplier Data Update	Bell Aaron	ACER AMERICA CORPORATION	33%	In progress	12/7/2017 11:57:38 AM
Supplier Data Update	BOWEN Max	DELL, INC.	100%	In progress	
Supplier Data Update	Mitchell Romeo	HEWLETT PACKARD COMPANY	77%	Approved	

4 Result(s)

[Page] [D] [V] [C] Buyer demo v8.156 ©

### Adding Suppliers to an Ongoing Campaign

As long as the campaign is not closed, you can add suppliers to it.

1. Display the *Gen. Info* tab.
2. Use the *Suppliers* selector to add suppliers.
3. Click **Save**.
4. Display the *Respondents* tab and assign a respondent to each supplier you've added.  
If using a role rule, click **Re-execute** to re-run the rule for new suppliers.
5. Click **Open New Forms** to invite new suppliers to respond.

### Canceling an Information Request Campaign

To cancel an on-going information request campaign, click **Terminate** in the action bar.


All the questionnaires that have not yet been submitted will be canceled.



## Reviewing Answers and Updating the Supplier Base

### Reviewing and Approving Answers

As soon as respondents submit their completed questionnaire, you receive a notification and you can review their answers in the *Answers* and *Comparison* tabs.

On the *Answers* tab, use the *Edit* icon  to access an individual respondent's response.

Questionnaire's answer : Supplier Data Update

Update supplier data Close

Campaign : Supplier Data Update  
Name : DELL, INC.  
Respondent : BOWEN Max

Download in Excel 2007-2010 format (xlsx)  
Download in Excel 97-2003 format (xls)

General information 100%

Address 100%

Administrative 88%

General information

Company name  
DELL, INC.

Website  
www.dell.com

Year of creation  
1984

Initialization Review

[Page] [D] [C]

To view a side-by-side comparison table of all respondents' answers, display the *Comparison* tab.

Supplier RFI : Supplier Data Update

Save Terminate Update Suppliers data Duplicate Campaign Promote to Template

Keywords : Search Reset  
Suppliers : Contact :

Type	Label	Mitchell Romeo - HEWLETT PACKARD COMPANY - Answers	BOWEN Max - DELL, INC. - Answers
Section General information			
Text	Company name	HEWLETT PACKARD COMPANY	DELL, INC.
Text	Website	www.hp.com	www.dell.com
Text	Year of creation	1947	1984
Section Address			
Text	Address name	Headquarters	bldg 7 78664
Text	Address line 1	Hanover Street	2401 Greenlawn Blvd
Text	Address line 2		-
Text	City	PALO ALTO	ROUND ROCK
Text	Zip Code	94304	78664
Selector	State	California	Colorado
Selector	Country	UNITED STATES	UNITED STATES

[Page] [D] [M] [C] Buyer demo v8.156 ©

If something is unclear or incomplete in a supplier contact's response, you can send the questionnaire back to the respondent for clarification or elaboration. To do so, use the **Send Back to Respondent** button in the response screen

If all is fine, click **Approve**. Approved data can be used to update the Supplier Base.

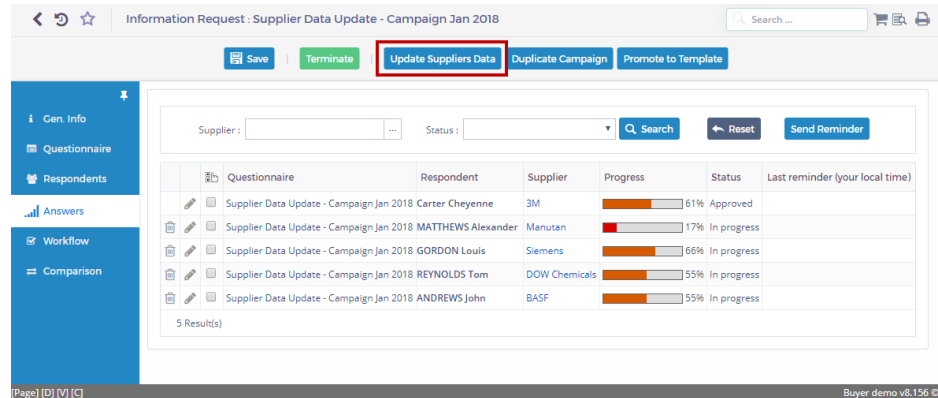
## Updating the Supplier Base

If the questionnaire includes data links to the Supplier Base, you can update supplier data with respondents' answers.

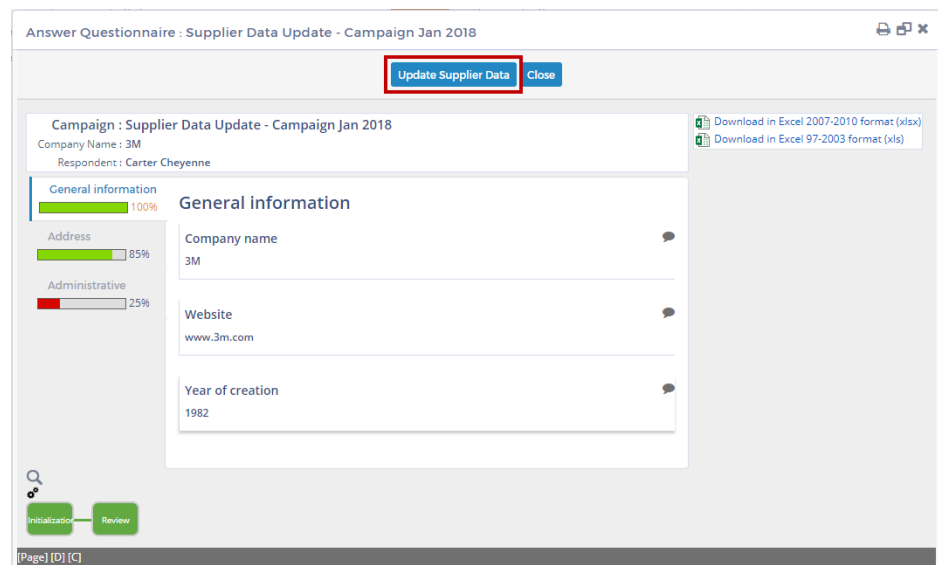
Supplier Base update functions become available when at least one questionnaire is in the Approved status.

Update functions can be accessed from two different locations in the application:

- By clicking the **Update Supplier Data** button in the main action bar, you can access the approved answers of all suppliers.



- By clicking the **Update Supplier Data** button in each supplier's response (*Answers* tab + *Edit* icon), you can access the approved answers of the current supplier.



Once in the *Update Supplier Data* dialog box:

- To update all the listed data, click **Update All**.
- To update a selection of fields, select the checkbox of the desired fields, and then click **Update Selected Lines**.

Update supplier data

Close Update all Update selected lines

Suppliers : ... Search Reset

Contacts : ... Field Mapping : ...

Contacts	Supplier	Column label	questionnaire answer	Current value
<input type="checkbox"/>	CARTER Cheyenne 3M	Supplier Name	3M	3M
<input type="checkbox"/>	CARTER Cheyenne 3M	Supplier Website	www.3m.com	
<input type="checkbox"/>	CARTER Cheyenne 3M	Supplier's Year of incorporation	1982	
<input type="checkbox"/>	CARTER Cheyenne 3M	Supplier Address: Label	Corporate HQ	Corporate HQ
<input type="checkbox"/>	CARTER Cheyenne 3M	Supplier Address: Street	3M Center	

[Page] [D] [C]

## Managing duplicate supplier records

### Simple Merge of Two Supplier Records With Transfer of Operational Objects

#### Purpose of the Merge Function

This merge function will trigger the following actions:

- Source supplier will be deleted.
- The operational objects of the source supplier (contracts, items, purchase requisitions, orders, invoices, etc.) will be transferred to the target supplier.

#### Accessing the Merge Function

1. Open the Supplier browse page.
2. Click the *Advanced edit* button available at the top of the page (specific authorization is required), and then scroll down the page.

[Browse Suppliers](#)

[Create new supplier](#)
[Advanced edit](#)
[Generate RFI](#)

Keywords:  Alerts:  Commodity:  Favorite only: ☐ [Search](#) [Reset](#) [Advanced search](#)

**Supplier**

Status:  Organization:  Approval:  Code:   
 Type:  Geo. Area:  Score Min.:  Validity:   
 Level:  Country:  Score Max.:  Status:   
 x Supplier Group Zip Code:  Required Docs missing:  Follow:   
 x Supplier Head-office  
 x Supplier Site

With catalog: ☐ Changes requested: ☐

**Documents**

	ID	Name	City	Country	Approval	Doc. Status	Doc. Validity	Rating	Locked
x	SUP000122	ABB	Paris	UNITED STATES	Approved	✓	●	2.71	<input type="checkbox"/>
x	SUP000005	AMAZON.COM, INC.	Seattle	UNITED STATES	Approved	✓	●		<input type="checkbox"/>
x	SUP000012	ASUS	Mountain View	UNITED STATES	Approved	✓	●		<input checked="" type="checkbox"/>
x	SUP000013	AT&T INC.	DALLAS	UNITED STATES	Approved	✓	●		<input type="checkbox"/>
x	SUP000135	BASF	Florham Park	UNITED STATES	Approved	✓	●	3.03	<input type="checkbox"/>
x	SUP000014	Becton-Dickinson			Approved				<input type="checkbox"/>
x	SUP003294	BNP PARIBAS		FRANCE	Approved				<input type="checkbox"/>
x	SUP000016	Bosch	Drancy	FRANCE	Approved				<input type="checkbox"/>

The *Advanced update* area has now appeared below the supplier list, as well as new action buttons relating to this feature.

[Browse Suppliers](#)
Search ...

[Create new supplier](#)
[Generate RFI](#)
[Quit advanced edit](#)
[Apply modifications](#)

Changes requested (1) : 1


	ID	Name	City	Country	Approval	Doc. Status	Doc. Validity	Rating	Locked
<input checked="" type="checkbox"/>	SUP000122	ABB	Paris	UNITED STATES	Approved	✓	●	2.71	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000005	AMAZON.COM, INC.	Seattle	UNITED STATES	Approved	✓	●		<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000012	ASUS	Mountain View	UNITED STATES	Approved				<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000013	AT&T INC.	DALLAS	UNITED STATES	Approved	✓	●		<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000135	BASF	Florham Park	UNITED STATES	Approved	✓	●	3.03	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000014	Becton-Dickinson			Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP003294	BNP PARIBAS		FRANCE	Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000016	Bosch	Drancy	FRANCE	Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000017	CABLESON PRO			Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000020	CDW	CHICAGO	UNITED STATES	Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000021	Central Energy Italian Gas Holding			Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000023	Comcast	Sunnyvale	UNITED STATES	Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000024	Computer Data Warehouse	Chicago	UNITED STATES	Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000025	Coviden			Approved				<input type="checkbox"/>
<input checked="" type="checkbox"/>	SUP000143	DELL BRASIL			Approved				<input type="checkbox"/>

54 Result(s)

Advanced update

merge in :  ...

## Merging Two Supplier Records

1. In the Supplier List, select the checkbox of the supplier you wish to delete (source supplier).
2. In the *Advanced update* area, select the supplier you wish to retain in the database (target supplier). To do so, click the *Selector* button  placed next to the *Merge in* field; in the window that appears, select the desired item by clicking its *Select* icon .
3. Click the *Apply modifications* button.

The first record is set to the *Deleted* status.

The following items of the deleted record (source) will be merged in the target supplier:

- Objects from the eProcurement life cycle (Purchase requisitions, purchase orders, receipts, invoices)
- Sourcing projects
- Contracts
- Catalogs
- Documents
- Contacts
- Supplier third party accounts
- Structure
- Workflow actions
- Transcodifications

## Advanced Deduplication of Supplier Records

### Purpose of the Deduplication Function

This advanced deduplication function aims at identifying duplicates that originate from spend data imports and allows for a precise control over the supplier hierarchy and data.

### Accessing the Deduplication Function

Select the *Suppliers / Cleansing* menu.

### Getting Familiar With the User Interface

The *Cleansing* page has 3 main parts:

1 Search filters area (→ Identifying duplicates, p.71)

2 Possible duplicate sets (according to selected search filters)

3 Detail of the selected duplicate set (→ Processing duplicates, p.72)

## Identifying Duplicates

The *Cleansing* page allows you to search for duplicates.

The screenshot shows the top of the 'Cleansing' page. At the top, there are navigation icons (back, refresh, star) and the page title 'Cleansing'. Below this is a search bar with the placeholder 'Search ...'. The main search filter area contains the following elements:

- Keywords:** A text input field.
- Level:** A dropdown menu with a downward arrow.
- Algorithm for identification of supplier's duplicate's \*:** A dropdown menu with a red border and a three-dot menu icon.
- Search and Reset buttons:** An orange 'Search' button and a grey 'Reset' button.
- Include suppliers previously designated "Not a duplicate":** A checkbox.

Below the 'Level' dropdown, there is a small text label 'x Supplier Site'.

To perform a search:

1. Define your search filters:

Filter	Description
Keywords	Keywords for narrowing down your search (by default, the keywords will be searched on the supplier name)
Level	Supplier levels you wish to search for duplicates (for instance, if you want to de-duplicate suppliers imported from your ERPs against existing sites in the IVALUA Supplier Base, select levels "Supplier ERP" and "Supplier site")
Algorithm for identification of supplier duplicates	<p>Several predefined algorithms are provided for you to search duplicates (on all or part of the supplier name, on their address, on their DUNS id, etc.).</p> <p>Please note:</p> <ul style="list-style-type: none"> <li>It is possible to create new algorithms (Administrator or Developer).</li> <li>In relation to algorithms for searching same supplier names, the Administrator has the ability to define keywords to be ignored (for instance, you may want to exclude "inc" so that supplier records whose name only differ by this keyword can still be brought up as duplicates).</li> </ul>
Include suppliers previously designated "Not a duplicate"	Select to display the suppliers that were previously marked as not being duplicates in the duplicate set detail area

2. Click **Search**. The list of found duplicate sets will be displayed underneath the search filters area.

This screenshot shows the 'Cleansing' page after a search. At the top, there is a 'Close this group' button. Below it, the search filter area is visible, with the 'Algorithm' dropdown now set to 'Same Duns'. The search results are displayed in a box titled 'Possible Duplicates'.


**Possible Duplicates**



- Computer Data Warehouse/CDW

1 Result(s)

## Processing Duplicate Sets

### Showing the Detail of a Duplicate Set

In the list of found duplicate sets, click the selection icon  of a duplicate set to show the detail of concerned suppliers.

< ↺ ☆ | Cleansing Search ...  






Close this group Set Group Set Head Office Merge to the chosen supplier

---

Keywords :  Level :  Algorithm for identification of supplier's duplicate's \* :  Search Reset  
Supplier Site Same Duns  
 Include suppliers previously designated "Not a duplicate" : ☐

---






Possible Duplicates: Show all columns : ☐

computer Data Warehouse/CDW Choose supplier to merge  SUP000024  SUP000020   

1 Result(s)

Highest Supplier Level	Supplier Group	Supplier Group
Parent Supplier		
① Name	Computer Data Warehouse	CDW
① External Code	C001486	C001482
① Corporate Name		CDW
① Web Site		http://www.cdw.com
① Type	Supplier	Distributor
Address office		
① Region Level		
① Region Node		
① Address Line 1		3 FIRST NATIONAL PLZ
① Zip Code		60602
① City	Chicago	CHICAGO

In the detail area, the following controls are available:

Control	Description
	Display more supplier data  <div>             Choose supplier to merge  </div> <div>  </div>
	Mark the supplier as "not a duplicate": it will be removed from the duplicate set.  In case of error, or if for any reason you need to view that supplier again in the duplicate set, you can make it show by selecting the search filter <i>Include suppliers previously designated "Not a duplicate"</i> .
	Select a supplier as the source supplier to be merged (→p.73) or select a supplier you want to assign the "Group" or "Head Office" level to (→p.74)



## Merging Suppliers

### What happens when you merge 2 suppliers?

Merging a source supplier into a target supplier will trigger the following actions:

- The source supplier will not be deleted: instead, the ERP level will be assigned to it, while all other levels that the source supplier may have had will be transferred to the target supplier.
- The source supplier will be attached to the target supplier (which becomes its parent).

The screenshot shows a web interface for merging suppliers. At the top, there are three radio buttons for selecting a supplier to merge: **SUP000150** (selected), **SUP000022**, and **SUP000001**. Below this is a table with columns: **Highest Supplier Level**, **Supplier Group**, **Supplier Head-office**, and **Supplier Site**. The **Parent Supplier** is listed as **IVALUA**. The table contains several rows of data, including **Supplier level**, **Supplier name (fr)**, **Supplier name (en)**, **Supplier code**, **Name**, **Commercial name (fr)**, **Commercial name (en)**, **Supplier SIREN #**, **Supplier SIRET #**, **sup\_doc\_followed**, and **Suppliers \*\*\***. Red circles and arrows indicate the steps: 1. Select the target supplier (SUP000150). 2. Select the source supplier(s) (SUP000022 and SUP000001). 3. Select the data of the source suppliers to be merged into the target supplier (the data rows). 4. Click the button **Merge to the chosen supplier**.

Choose supplier to merge	SUP000150	SUP000022	SUP000001
Highest Supplier Level			
Supplier Group			
Supplier Head-office			
Supplier Site			
Parent Supplier	IVALUA		
Supplier level	Supplier Group	Supplier Head-office	Supplier Site
Supplier name (fr)			
Supplier name (en)	IVALUA Orsay	IVALUA	IVALUA INC
Supplier code			IVA456
Name			
Commercial name (fr)			
Commercial name (en)			
Supplier SIREN #		428796858	
Supplier SIRET #		42879685800036	
sup_doc_followed		No	
Suppliers ***			

**4 Merge to the chosen supplier**

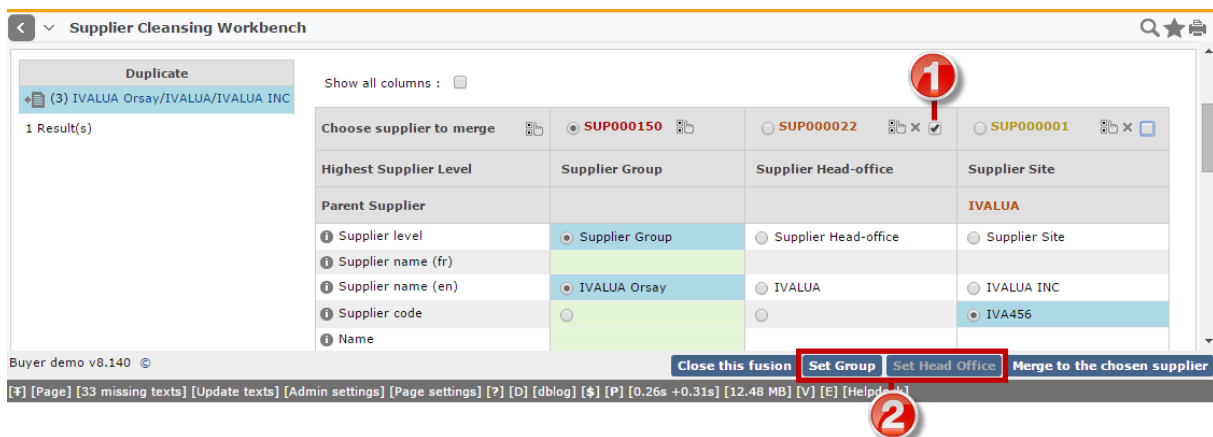
1. Select the target supplier.
2. Select the source supplier(s).  
Deselect the suppliers you do not want to merge (to remove these from the duplicate set, you can click their icon *Not a duplicate* ✕).
3. Select the data of the source suppliers to be merged into the target supplier.
4. Click the button Merge to the chosen supplier.

## Redefining a Supplier's Level in its Hierarchy

Within a set of duplicates that belong to the same hierarchy, you have the ability to redefine supplier level.

The levels that you can assign depend on the selected supplier because the assignment you make must abide by the rules that control the way supplier hierarchies are organized. You should keep 2 rules in mind:

- The level you assign to a given supplier must be the level that ranks immediately above the supplier's current level: A Site level supplier can be assigned the "Head Office" level, but not the "Group" level.
- The **Set Group** button will only be available if the duplicate set includes a Group level supplier. Likewise, the **Set Head Office** button will only be available if the duplicate set includes a Head Office level supplier.



The screenshot shows the 'Supplier Cleansing Workbench' interface. On the left, a 'Duplicate' section lists '(3) IVALUA Orsay/IVALUA/IVALUA INC' with '1 Result(s)'. The main area displays a table of supplier data with columns: 'Choose supplier to merge', 'Highest Supplier Level', 'Supplier Group', 'Supplier Head-office', and 'Supplier Site'. The table contains three rows of data. A red circle with the number 1 points to the checkbox in the 'Choose supplier to merge' column for the row with 'SUP000022'. Below the table, there are buttons: 'Close this fusion', 'Set Group', 'Set Head Office', and 'Merge to the chosen supplier'. A red circle with the number 2 points to the 'Set Group' button.

Choose supplier to merge	Highest Supplier Level	Supplier Group	Supplier Head-office	Supplier Site
<input type="radio"/> SUP000150	Supplier Group			IVALUA
<input type="radio"/> SUP000022	Supplier Group			IVALUA
<input type="radio"/> SUP000001	Supplier Group			IVALUA INC

Buttons: Close this fusion, Set Group, Set Head Office, Merge to the chosen supplier

1. Select the checkbox of the supplier you want to modify.
2. Click the button **Set Group** or **Set Head Office** depending on the case.

# **ASSESSING SUPPLIERS AND IMPROVING THE RELATIONSHIP**

---

## Evaluations

### Spot Evaluations

Unlike Scoring Campaigns, where questionnaires are assigned to selected respondents, Spot Evaluations are created at the discretion of the connected user to give feedback on their interaction with that supplier. This means that ANY user who has access to the supplier record can create and fill out a spot evaluation.

### Answering the Evaluation Questionnaire

1. In the Supplier Record, display the *Scoring* tab.

The screenshot shows the 'Supplier AEG' interface with the 'Scoring' tab selected. The main content area displays the 'Last Score Supplier (global score)' as 5. Below this, there is a table of sub-criteria scores and a radar chart for sub-criteria. At the bottom, there is a section for 'DETAILED EVALUATIONS' with a 'Create Quick Eval' button and a table of evaluations.

Sub-criteria	Value
Capacity for variations in demand	5.00
Adherence to commitments	5.00
Total costs of doing business	5.00
Expertise Available and Shared	5.00
Responsiveness in solving issues	5.00

Campaign	Evaluation date	Score	Respondent
Recurring Supplier Assessment	1/29/2018	5.00	DELEST Armelle

1 Result(s)

2. Click Create Quick Eval.

If there are more than one questionnaire templates for the *Supplier Scoring* type, a list of available templates will display as a contextual menu: select the desired template.

The questionnaire form is displayed.

### 3. Fill in the questionnaire.

Note the following:

The questionnaire can be broken down into tabs. You must display each tab and answer all questions. A blocking alert is displayed at the bottom of the form until you have done so.

With each answer, the progress bar and percentage of the corresponding tab are updated to reflect the level of completeness of the questionnaire. The score is computed anew.

You can answer the entire questionnaire at once or save the questionnaire and come back later.

Some questions may allow or even require you to provide a comment or a file attachment.

Some questions may allow you to select *Not applicable* to indicate that the question does not apply to your context.

### 4. Click **Save**.

## Submitting a Completed Evaluation

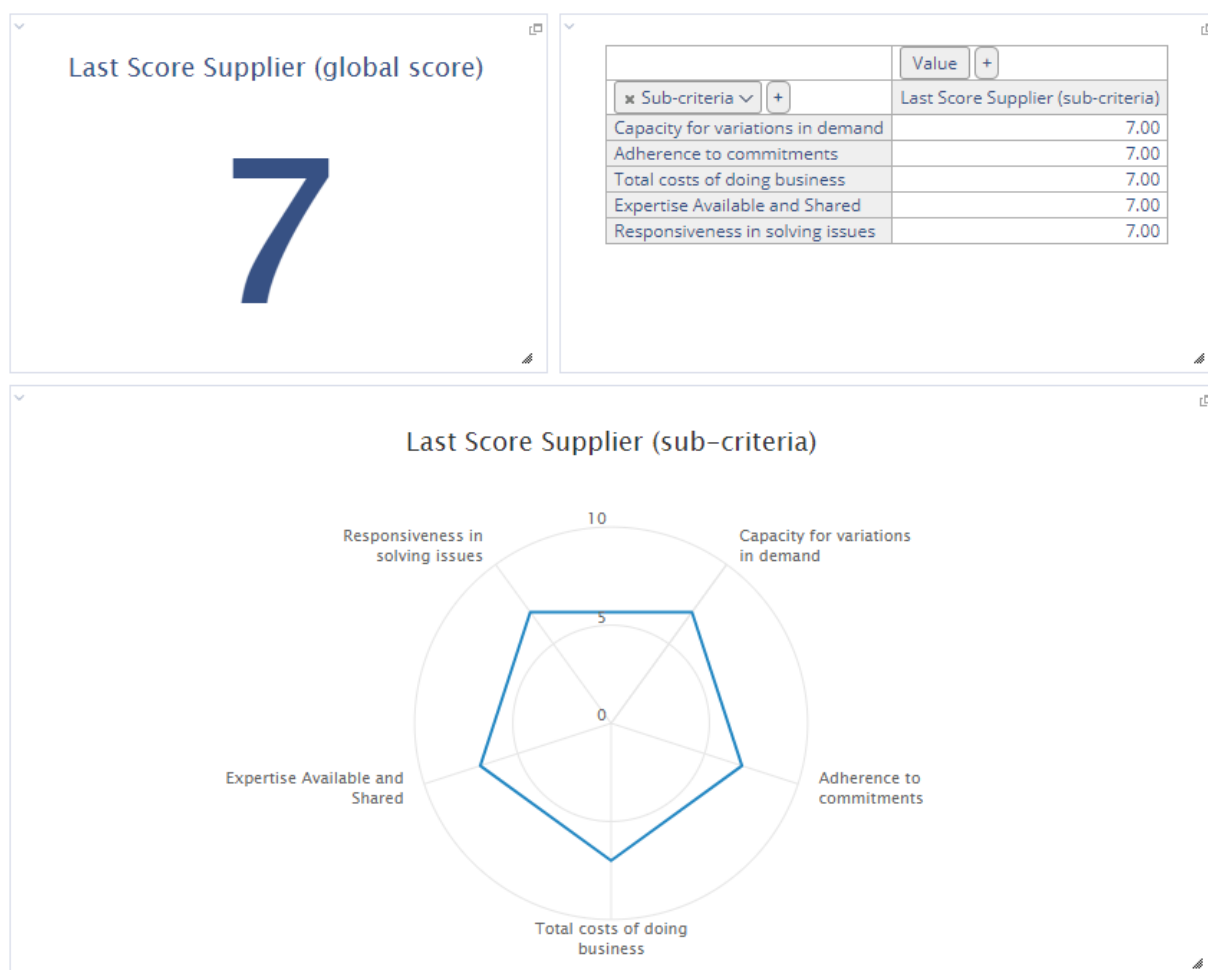
Once you have completed the questionnaire, you must submit it so that your evaluation can be taken into account and reflected in the supplier *Scoring* tab.

To do so, click **Approve**, and then click **OK** in the confirmation message box that is displayed.

Once submitted, your questionnaire becomes read-only.

Click the **Close** button to close the questionnaire and go back to the supplier *Scoring* tab.

This tab now shows your evaluation results: last supplier score, score breakdown into sub-criteria (table and radar chart).



## About Scoring Campaigns

The IVALUA Suite also includes a separate module dedicated to managing scoring campaigns. Unlike Spot Evaluations, campaigns offer the ability to assess a whole set of objects (suppliers, contracts, and so on) and manage all these evaluations within a single process.

The Scoring Campaigns module facilitates the collection of evaluation data, its consolidation and analysis.

For further information about this module, refer to the dedicated user guide.

## Exception Management and Improvement Plans

The IVALUA Suite complements its supplier performance evaluation features with additional modules geared toward continuous improvement:

- Exception Management
- Improvement Plans

The **Exception Management** module gives you the ability to report problems arising within the relationship with the supplier and track the issue to resolution.

Exception Details : Prices not up to date

Search ...

SaveExitDeleteCloseSave & NewNotify via Email

EXCEPTION DETAILS

Description : Prices not up to date

Exception Type : Price

Creation Date : 6/28/2016

Severity : Major

Manager : Young Emma

Delegate to :

OUTCOME

Status : In process

End Date : 6/28/2016

Prices updated

Outcome :

ORIGIN

Supplier : DOW Chemicals

Contract :

Sourcing Process :

Order :

Delivery :

Invoice : INV178070 788465154

Commodities :

Organizations :

ASSOCIATED IMPROVEMENT PLANS

Create a Improvement Plan for this Exception

	Label	Supplier	Start Date	End Date	Tasks	Status
	Price update for internal catalogs	DOW Chemicals	5/2/2016	6/30/2016	0	In progress

1 Result(s)

ADD A COMMENT

Comment

Click or Drag to add files

Page | D | V | C

Buyer demo v8.156 ©

The **Improvement Plans** module helps you build and follow up a plan of corrective actions or Kaizen type initiative with the supplier to address the problems that have been identified.

The screenshot shows a web application interface for managing improvement plans. At the top, there is a navigation bar with a title 'Improvement plan: Price update for internal catalogs', a search bar, and a shopping cart icon. Below the navigation bar are 'Save' and 'Exit' buttons. The main content area is divided into several sections:

- General Info.** (Left sidebar menu)
- Tasks** (Left sidebar menu)
- PLAN IDENTITY** (Main form section):
  - Label: Price update for internal catalogs
  - Supplier: DOW Chemicals
  - Status: In progress
  - Start Date: 5/2/2016
  - End Date: 6/30/2016
- SCOPE** (Main form section):
  - Organization: United-States
  - Commodity: EQ\_LA - Laboratory
- ORIGIN** (Main form section):
  - Evaluation Campaign:
  - Exception: Prices not up to date
- ADD A COMMENT** (Main form section):
  - Comment text area
  - Click or Drag to add files button

At the bottom of the page, there is a footer with the text '[Page] [D] [V] [C]' and 'Buyer demo v8.156 ©'.

For further information about these modules, refer to the dedicated user guides.



## REFERENCE GUIDE

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## Browse Suppliers Page

The *Browse Suppliers* page provides a complete picture of the supplier database.

### Accessing the Browse Suppliers Page

Select *Suppliers / Browse Suppliers* from the menu.

### Getting Familiar With the Browse Suppliers Page

The *Suppliers* page allows you to browse and manage the Supplier Base.

It contains 3 main parts:

- 1 Search filters
- 2 List of results
- 3 Action bar

Keywords : Alerts : Commodity (1) : Favorite only : Search Search Reset Advanced search

Supplier

1 status : Organization (1) : Approval (1) : Code (1) :  
 Type : Geo. Area : x Approved  
 Level : Country (1) : Score Min. : Validity :  
 x Supplier Group Zip Code : Score Max. : Status :  
 x Supplier Head-office  
 x Supplier Site

Documents

With catalog : Required Docs missing : Follow :  
 Changes requested (1) :

	ID	Name	City	Country	Approval (1)	Doc. Status (1)	Doc. Validity (1)	Rating (1)	Locked (1)
2	SUP000122	ABB	Paris	UNITED STATES	Approved	✓	●	2.71	
	SUP000005	AMAZON.COM, INC.	Seattle	UNITED STATES	Approved	✓	●		
	SUP000012	ASUS	Mountain View	UNITED STATES	Approved	✓	●		
	SUP000013	AT&T INC.	DALLAS	UNITED STATES	Approved	✓	●		
	SUP000135	BASF	Florham Park	UNITED STATES	Approved	✓	●	3.03	
	SUP000014	Becton-Dickinson			Approved				

### Search Filters

This area includes various filters that you may combine in order to fine tune your search, and thus retrieve a specific supplier or a set of suppliers meeting precise criteria.









The option *Supplier with catalog* aims at restricting the display to suppliers with items referenced in the catalog.


The option *Advanced editing* allows you to merge 2 supplier records, duplicate records for instance (see *Simple Merge of Two Supplier Records With Transfer of Operational Objects*, page 68).

## List of Results

It displays suppliers that match the criteria selected in the search filters area.

The table below gives a description of the data presented for each supplier:

Column	Description								
 (Right click on the list header row)	Gives access to the following features: <ul style="list-style-type: none"> <li><i>Show/Hide columns</i>: lets you select the columns you wish to display or hide in the list</li> <li><i>Download in Excel format</i>: lets you download the list into Microsoft Excel® format</li> </ul>								
	Deletes the Supplier record (deletion becomes effective only after confirmation)								
	Opens the Supplier record.								
	Allows you to select suppliers you wish to send an RFI to								
	Indicates the presence of anomalies on the Supplier record Hover the icon with your mouse cursor to display alerts in a tooltip.								
	Allows you to mark/unmark a supplier as favorite (the icon will change appearance depending on its status: non-favorite =  / favorite =  You then have the ability to filter favorite supplier using the checkbox <i>Only favorite suppliers</i> in the supplier list's filters area.								
ID	Supplier code automatically assigned by IVALUA (read-only)								
Name	Supplier's corporate name – Click to open up the Supplier record in View mode (read-only).								
Parent company	Name of the parent company the current supplier is related to.								
Level	Operational level of the supplier (if the supplier belongs to a group that includes several entities, the supplier level indicates their position within the operational structure): <ul style="list-style-type: none"> <li>Group</li> <li>Head-Office</li> <li>Site</li> <li>ERP (specifically for managing supplier data originating from external ERPs as part of the spend analysis function)</li> </ul>								
City	Supplier's city								
Country	Supplier's country								
Web site	URL of supplier's web site								
Status	Supplier status within the suppliers' activation workflow <table> <tr> <td>Drafted</td><td>The Supplier Record is in the process of being created but its activation workflow has not been launched yet</td></tr> <tr> <td>Activation in progress</td><td>The activation workflow has been launched</td></tr> <tr> <td>Activated</td><td>The supplier has been activated and can now be used in the various IVALUA modules</td></tr> <tr> <td>Archived</td><td>(not used in the out-of-the-box version) Can be used to differentiate, on one hand, suppliers which you want to delete because they have been created in error, and, on the other hand, suppliers that were once active, but which you no longer want to work with. Archived suppliers continue to be accounted for in analysis reports but can no longer be used in the application.</td></tr> </table>	Drafted	The Supplier Record is in the process of being created but its activation workflow has not been launched yet	Activation in progress	The activation workflow has been launched	Activated	The supplier has been activated and can now be used in the various IVALUA modules	Archived	(not used in the out-of-the-box version) Can be used to differentiate, on one hand, suppliers which you want to delete because they have been created in error, and, on the other hand, suppliers that were once active, but which you no longer want to work with. Archived suppliers continue to be accounted for in analysis reports but can no longer be used in the application.
Drafted	The Supplier Record is in the process of being created but its activation workflow has not been launched yet								
Activation in progress	The activation workflow has been launched								
Activated	The supplier has been activated and can now be used in the various IVALUA modules								
Archived	(not used in the out-of-the-box version) Can be used to differentiate, on one hand, suppliers which you want to delete because they have been created in error, and, on the other hand, suppliers that were once active, but which you no longer want to work with. Archived suppliers continue to be accounted for in analysis reports but can no longer be used in the application.								

Column	Description
Approval	<p>Approval status of supplier</p> <p>The status displayed here is the highest of the supplier's commodity approvals that match the selected Organization and Commodity filters. For instance, if a supplier has an Approved status on one of their commodities and a Forbidden status on another, the displayed status in this column will be Approved.</p> <p>Hover your mouse over the status to display the list of approvals in a tooltip:</p> 
Doc. Status	<p>Overall conformity status of credentials</p> <p>If at least one document is non-compliant in the supplier record, the supplier will be listed with a non-compliant overall status in the list of suppliers.</p> <p>✓ All documents have a <i>Compliant</i> status</p> <p>✗ At least one document has one of the following statuses: <i>Being created</i>, <i>To be checked</i> or <i>Non-compliant</i></p>
Doc. Validity	<p>Overall validity status of credentials as calculated against their validity dates</p> <p>● Valid: all documents are valid in relation to their validity dates</p> <p>● Impending expiry: at least one document has reached the alert delay set for its type</p> <p>● Invalid: at least one document is not valid in relation to its validity dates (begin date in the future, end date exceeded)</p>
Rating	<p>Overall performance rating score obtained by the supplier (<i>Performance rating</i> tab)</p>
Change request status + Locked	<p>These 2 columns are displayed when Supplier Change Requests are enabled (see p.36 for more information about this feature).</p>

## Action Bar

Button	Description
Create new supplier	Creates a new Supplier record (see <i>Supplier record</i> , p.85)
Generate RFI	Creates a new supplier RFI (you must first select one or more suppliers using their checkbox)
Advanced Edit	Gives access to the supplier record Merge feature (see p.68)

## Searching for Suppliers

The upper part of the *Suppliers* window contains search filters. These filters let you easily retrieve a supplier or a set of suppliers meeting specific criteria.

1. Define your search criteria by selecting appropriate filters.
2. When done, click the **Search** button to start searching. Matching items are displayed in the results list.

To cancel selected filters and go back to the default list, click the **Reset** button.

## Supplier record

### Overview

A Supplier record contains all the information currently available about the supplier. It consists of two parts:

- 1 Supplier Data Tabs
- 2 Action Bar

### Tabs

The tabs allow structuring the supplier information.

To obtain a description of each tab, refer to the following sections:

Tab name	Page
Overview	87
Identity	87
Information	90
Invoicing	91
Contacts	93
Documents	94
Qualifications	97
Scoring	98
Activity	98
Financial	101

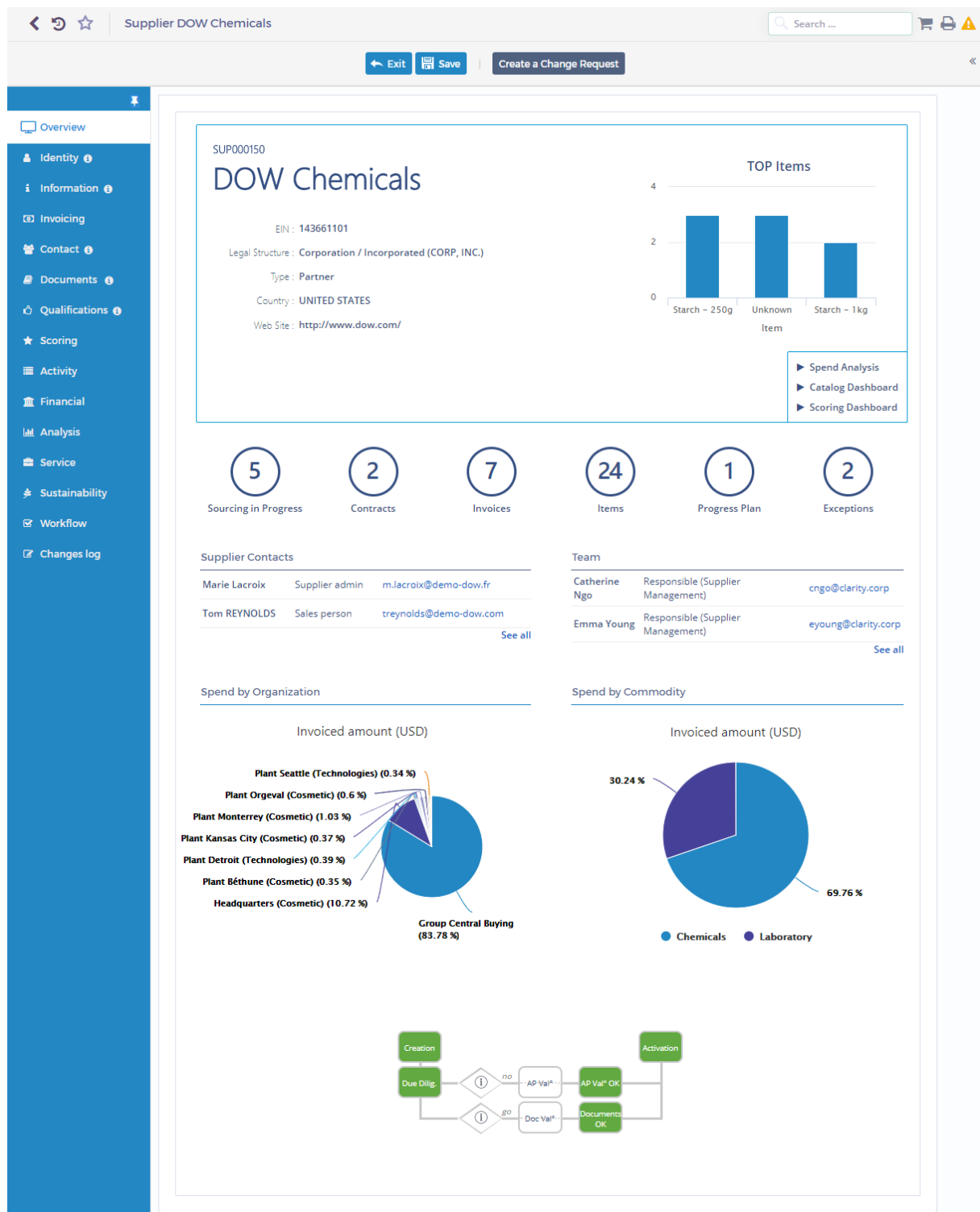
<b>Tab name</b>	<b>Page</b>
Analysis	102
Services	98
Workflow	104
Change Log	105

Upon creation, a Supplier record contains only two tabs (*Identity* and *Information*); other tabs are displayed after the first Save.

### Action Bar

<b>Button</b>	<b>Description</b>
<b>Save</b>	Saves data entered in any tab and keeps the Supplier record open
<b>Exit</b>	Saves your edits and closes the page.
<b>Create a change request</b>	This button is available only when change requests are enabled (change requests are a way of exerting tight control over changes brought to the Supplier Record). For further details, see p.36)

## Overview Tab



This tab provides a high-level, at-a-glance view of supplier activity, main analytics, and contact people on the buy- as well as supply-side. There is also a miniature view of the supplier activation workflow.

## Identity Tab

Supplier DOW Chemicals

Search ...

Exit Save Create a Change Request

Overview

Identity

Information

Invoicing

Contact

Documents

Qualifications

Scoring

Activity

Financial

Analysis

Service

Sustainability

Workflow

Changes log

**SUPPLIER INFORMATION**

Status : Activated

Code : SUP000150

External Code : C001635

Company Name : DOW Chemicals

Legal Name : DOW Chemicals

Web Site : <http://www.dow.com/>

Comment :

**ADDRESS**

Address Label :

Address Line 1 : 2030 Dow Ct

Address Line 2 :

Zip Code : 48674 City : Midland

Country : UNITED STATES

State/Province : Michigan

**PURCHASING INFORMATION**

Catalog Access :

Type : Partner

Typology : A

Incoterm :

Incoterm Location :

Group Orders : ☐

**SUPPLIER HIERARCHY**

Level :

Supplier Group

Supplier Head-office

Supplier Site

Parents / Child SUP000150 [ C001635 ] DOW Chemicals UNITED STATES Midland

TRACKING >

[Page] [D] [V] [C]

Buyer demo v8.156 ©

This is the supplier's identity sheet, it contains the following information:

Field	Description
Status	Supplier Record status, which indicates the validity of the supplier's registration within IVALUA (Drafted, Activation in progress, Activated)
Code	Internal ID automatically assigned by IVALUA (read-only)
External Code	Supplier ID from the ERP system (editable only by authorized users)
Company Name	Name under which the company is doing business
Legal Name	Name under which the company is officially registered
Web Site	URL of the supplier's website
Comment	Can be seen by the supplier
Address	Full address of company headquarters
Catalog Access	URL of supplier catalog
Supplier type	Distributor, Manufacturer, Supplier, Partner, and so on
Supplier typology	Typology, indicates the supplier's strategic importance. The typology used in the out-of-the-box version is ABC, but this is configurable.
Incoterm / Incoterm Location	In purchase orders to be placed with this supplier, incoterm info will be defaulted with your selection in this tab.
Group orders	Used in P2P processes; when enabled, all PR items related with this supplier will be on hold until manually grouped together to generate a PO. For further details, refer to the Procurement user guide.



Levels	<p>To define the operational structure of the suppliers registered on its supplier portal, IVALUA uses a set of levels:</p> <ul style="list-style-type: none"><li>▪ Group</li><li>▪ Head Office</li><li>▪ Site</li><li>▪ ERP (this last level being reserved for handling suppliers imported from ERPs)</li></ul> <p>The specific set of tabs available in the supplier record can be adapted to the position of the supplier in its hierarchy. Likewise, application objects such as RFPs, contracts, or orders, are each linked to a specific level.</p> <p>With this in mind, each supplier can be assigned one or more levels. Smaller suppliers, for instance, could hold multiple levels concurrently, while more complex groups can be organized into hierarchies.</p>
Parent/Child	<p>Supplier operational hierarchy represented as a tree structure - each supplier name in the tree structure is a clickable link, which allows you to access the corresponding supplier record.</p>

**See also:**

*Assigning Supplier Levels, page 17*

*Defining Hierarchical Links Between Suppliers, page 18*

## Information Tab

Supplier DOW Chemicals

Search ...

Exit Save Create a Change Request

Overview Identity Information Invoicing Contact Documents Qualifications Scoring Activity Financial Analysis Service Sustainability Workflow Changes log

**CORPORATE INFORMATION**

Legal Structure : Corporation / Incorporated (CORP, INC.)  
 NAICS Code : 20.59Z - Manufacture of other chemicals n.c.a.  
 Non-Profit : ☐ Year Founded :  
 Factoring Company : ☐ Intra-group : ☐

**ORDER ADDRESS**

Complément de nom :  
 Address Line 1 :  
 Address Line 2 :  
 Zip Code : City :  
 Country :

**GOVERNMENT OR 3RD PARTY IDS**

SIRET # :  
 Gov't I.D.# (EIN, SIREN) : 143661101  
 Tax ID Number : 38-1285128  
 DUNS : 07-976-7589

**PAYMENT ADDRESS**

Address Label : Blue Cube Operations LLC  
 Address Line 1 : PO Box 2047  
 Address Line 2 :  
 Zip Code : 48641-2047 City : Midland  
 Country : UNITED STATES  
 State/Province : Michigan

[Page] [D] [V] [C] Buyer demo v8.156 ©

This tab lets you enter/view the supplier's administrative data:

- Corporate settings: Legal Structure, NAICS code, Year Founded, Non-Profit, Intragroup, and Factoring Company (suppliers declared as factoring companies can be selected in the payment and accounting information of the *Invoicing* tab of suppliers who choose to factor).
- Government or 3<sup>rd</sup> Party IDs: DUNS, Tax ID Number, Government ID Number (EIN, SIREN), SIRET (France only)
- Order and payment addresses: Used in P2P processes

Some of the *Information* tab fields can be auto-populated by partner content providers (requires a subscription).

## Invoicing Tab

Supplier DOW Chemicals

Search ...

Exit Save Create a Change Request

Overview  
Identity  
Information  
**Invoicing**  
Contact  
Documents  
Qualifications  
Scoring  
Activity  
Financial  
Analysis  
Service  
Sustainability  
Workflow  
Changes log

**PAYMENT & ACCOUNTING INFORMATION**

Payment mean	Payment term	Auxiliary account code	Legal Company
Bank Transfer	30 days invoice date		Clarity Cosmetic

1 Result(s)

**BANKING INFO.**

Financial Institution	Clearance Agency	Default
Bank of the West	Los Angeles	✓

1 Result(s)

**EARLY PAYMENT PROGRAM**

Discount (%): 2.00 % for NET: 10

Enroll in Early Payment Program: ☒

Number of invoice early payments per month

Month	Number of invoice early payments per month
February 2018	2
March 2018	1
April 2018	3

BUSINESS MESSAGES >

CONNECTION PARAMETERS >

[Page] [D] [V] [C]

Buyer demo v8.156 ©

This tab lets you specify the following types of information:

### Payment and accounting information

These are sets of information that can be defined per legal company and are used to default payment and accounting information in the P2P process. They include: payment type and terms, tax mode (self-assessment), third party accounts for current and fixed assets, and auxiliary account (for further explanation of each of these fields, see p.30).

Field	Description
Legal Company	You can declare a different set of Payment and Accounting Information per legal company. <b>Important note:</b> Specifying the legal company is optional. Payment terms that are not associated to a specific company will become the default payment terms and will be used for P2P transactions involving legal companies whose payment terms are not specified.
Payment means and terms	When placing an order, the payment means and terms are automatically prepopulated based on the contract linked to the order, or in the absence, they will be populated based on the data selected in this screen.  In other words, if you set up payment terms here, but notice that the payment terms that are prepopulated in orders placed with this supplier do not match those you've set up, this probably means that the items ordered are linked to a contract that provides otherwise.
Tax mode	The main purpose of tax mode is to specify whether tax should be self-assessed with this supplier. This influences the way accounting entries are generated in invoices.
Factor	If the supplier uses Accounts Receivable Financing (or Factoring), this field lets you select the factoring company from the Supplier Base. To be able to select a factoring company here, that company's supplier record must have been created beforehand and the company must have been declared as a factoring company in its <i>Information</i> tab.

<i>Field</i>	<i>Description</i>
Third party accounts for current and fixed assets	These are the Accounts Payable accounts where all the liabilities to suppliers (that is the amount of all recorded invoices that have not yet been paid for), should be recorded. There are two such accounts, one for liabilities incurred to buy assets and one for expenses: it's the nature of the purchase (asset or expense) that determines which AP account will be used. These accounts can be specified at the legal company level, in which case they apply to all suppliers by default. They can also be specified here (at the supplier level), in which case they override the default accounts set for the legal company. In the invoice, accountants ultimately retain the ability to specify any AP account they deem appropriate.
Auxiliary account code	If you need to track transactions within AP accounts in more detail using a subsidiary ledger, this is where you can specify the subledger to be used for the current supplier.

## Early Payment Program

With the Early Payment Program, you can offer selected suppliers the flexibility to expedite receipt of payment in exchange for a discount. Suppliers enrolled in this program then decide which individual invoices they approve for early payment.

Calculation of applicable discount is based on two parameters:

- Percentage of discount
- Number of days

Those parameters are used to evaluate the percentage of discount based on a linear calculation.

'2% NET 10', for instance, means that up to 10 days after the invoice date, a 2% discount is granted, which linearly decreases to zero after that, until the due date. So, the earlier the payment, the greater the discount.

## Banking information

This area provides a space to declare the supplier's bank accounts to be used in the P2P process. You can set up several accounts for a supplier: the *Default* box designates which one is the primary account.

The Bank Identifier Code (sometimes called SWIFT) is an international standard used to identify a specific bank.

For account identification, various systems of codes are included; while some are international standards (IBAN), others are national systems (ABA and RIB). National systems of codes can be configured to be hidden when not applicable.

Notes:

- When keying in the IBAN, you must remove the spaces in the BBAN field.
- ABA is specific to the USA.
- RIB is specific to France. The RIB is automatically populated based on the IBAN when the IBAN country code is FR. The reverse is also true: if you enter the RIB, the IBAN will be auto populated.

## Business Messages / Connection Parameters

These areas are dedicated to the configuration of interfaces shared with the P2P module for electronic delivery of POs and invoices. Supported exchange formats are EDI and cXML.

### See also:

*Declaring Supplier Banking Information, page 29*

*Declaring Supplier Payment and Accounting Information, page 30*

## Contacts Tab

The screenshot displays the 'Supplier DOW Chemicals' interface. The top navigation bar includes a search bar and buttons for 'Exit', 'Save', and 'Create a Change Request'. The left sidebar lists various modules, with 'Contact' highlighted. The main area is split into two sections: 'SUPPLIER CONTACTS' and 'INTERNAL TEAM'. The 'SUPPLIER CONTACTS' section contains a table with two entries: 'Lacroix Marie' (Supplier admin) and 'REYNOLDS Tom' (Sales person). The 'INTERNAL TEAM' section contains a table with two entries: 'cngo@clarity.corp' (Responsible (Supplier Management) - NGO Catherine) and 'eyoung@clarity.corp' (Responsible (Supplier Management) - YOUNG Emma).

This tab lets you manage contacts in relation to the supplier. There are 2 distinct categories of contacts: supplier contacts and internal users.

### Supplier contacts

These are the supplier contact persons.

New supplier contacts can be created either by existing supplier contacts via the Purchasing Portal, or by buyers (see page 19). Both supplier users and buyers can generate IVALUA login credentials for contacts that need to access the application via the Purchasing Portal (see page 21).

A contact can be attached to multiple suppliers within the same hierarchy (multi-supplier contact, see page 22).

### Internal users

The *Internal users* frame allows you to list internal users in charge of the supplier, particularly users who will be granted permission to update the record data. There are 3 internal user profiles:

- **Owner:** (required, assigned to the record creator by default; in the case of a self-registration, the internal user who validates the registration is considered the creator) Users with an Owner profile are in charge of the supplier they own. Their role is to input and control the supplier record information, and manage the internal buy-side team assigned to the supplier (add or remove users).
- **Contributor:** A user with the Contributor profile can fill in the information of the record.
- **Guest:** (default) Users with a Guest profile can view the supplier record. They cannot modify it.

#### See also:

*Creating a New Supplier Contact, page 19*

*Creating a User Account for an Existing Supplier Contact, page 21*

*Managing Multi-Supplier Contacts, page 22*

## Documents Tab

### Overview

This tab provides a space where supplier contacts and internal users can upload required legal documents, certifications, and other documents. Once supplied, documents can be downloaded from this screen. They are listed by category, with each category grouping one or more document types.

Document categories and types are managed by the Administrator. Through document types' configuration, the Administrator can specify which document types are **available** and which are **mandatory**; these characteristics can vary based on country, commodity, organization, and/or other custom criteria. Other document type settings include **validity duration**, **advance notification days** (number of days in advance of the expiry date that suppliers will be notified they need to update a document), and whether the document **conformity status is workflow-driven or selected manually**; for a given document type, a different workflow can be implemented per country, commodity, and/or organization.

The option *Follow documents* is used to identify suppliers whose documents you want to follow. A filter lets you easily retrieve these suppliers in the supplier browse screen. As part of a subscription with a partner, enabling this option will include the supplier in the list of suppliers followed by the partner.

### Access Rights

Documents can be **viewed** by profiles that have been granted the View authorization associated with the document type or users who act as performers in the document approval workflow.

Documents can be **edited** by profiles that have been granted the Edit authorization associated with the document type or users who act as performers in the document approval workflow with an Edit authorization on the workflow activity.

Documents can be **created** by users who have been granted the View and Edit authorizations for the document type

## User Interface

Supplier DOW Chemicals

Follow documents: ☒

Keywords:  State to date: 1/16/2018  Archived Documents: ☐

**LEGAL DOCUMENTS**

Add legal documents

	Attach	Document Type	Name	Begin Date	Expiration Date	Owner	Status	Notification Date	Valid	
				URSSAF		2/1/2017	1/31/2018	Tom REYNOLDS	✓	
				Certificate of Incorporation	Certificate of Incorporation	1/1/2018	1/1/2019	Armelle DELEST	✓	

2 Result(s)

**CERTIFICATIONS**

Add certifications

0 Result(s)

**OTHER DOCUMENTS**

Add other documents

	Attach	Document Type	Name	Begin Date	Expiration Date	Owner	Status	Notification Date	Valid	
				Non Disclosure Agreement	NDA	5/26/2017	5/26/2018	Tom REYNOLDS	✓	

1 Result(s)

[Page] [D] [V] [C] Buyer demo v8.156 ©

Each document category table presents the following information:

Column	Description
(Right-click on the header row)	Accesses the following features: <ul style="list-style-type: none"> <li><b>Show/Hide columns:</b> allows you to select the columns you want to show or hide in the list</li> <li><b>Download in Excel format:</b> Allows you to download the list in MS Excel format</li> </ul>
	Accesses document settings (file selection and upload, validity dates and compliance approval)
	Adds a document
Att	Attachments. Click an attachment icon to download it.
	Accesses the history of documents uploaded by the supplier for the selected type
Document type	Document type Required document types are marked with a red asterisk. The Administrator defines which document types should appear and which ones should be mandatory per country, commodity, organization, and/or other customizable criteria.
Title	Document title

Column	Description								
Begin validity date End validity date	Validity dates of the document								
Owner	By default, the user who adds the document								
Status	<p>Document compliance status</p> <p>An approval workflow can be associated with each document type so that the buyer can approve the documents uploaded by the supplier in the portal. The document compliance status is displayed in the form of a visual indicator (red cross or green check mark) and is further specified in a tooltip:</p> <p>✔ Compliant</p> <p>✘ Being created, To be checked or Compliant</p> <p>When there is at least one non-compliant document, the supplier will be displayed with an overall non-compliant status in the supplier list.</p>								
Validity	<p>Document validity in relation to its Begin and End validity dates</p> <p>Auto-calculated and read-only</p> <p>3 possible validity statuses:</p> <p>● Valid</p> <p>● Impending expiry: the document has reached the alert delay defined for the document type</p> <p>● Invalid: the document is not in its validity period (end date exceeded or begin not reached)</p> <p>When the end date is exceeded, it will be displayed on a red background.</p> <table><tr><th>Date de fin de validité ▶</th><th>Propriétaire ▶</th><th>Statut ▶</th><th>Validité ▶</th></tr><tr><td>06/02/2014</td><td>DE A</td><td>✔</td><td>●</td></tr></table>	Date de fin de validité ▶	Propriétaire ▶	Statut ▶	Validité ▶	06/02/2014	DE A	✔	●
Date de fin de validité ▶	Propriétaire ▶	Statut ▶	Validité ▶						
06/02/2014	DE A	✔	●						

**See also:**

*Attaching Documents, page 31*

*Archiving/Unarchiving Documents, page 33*



## Qualifications Tab

Supplier DOW Chemicals

Search ...

Exit Save Create a Change Request

Overview Identity Information Invoicing Contact Documents Qualifications Scoring Activity Financial Analysis Service Sustainability Workflow Changes log

Commodity : Organization : Current Status : Search Reset

Only my pending approvals :

+ Add a line + Add multiple qualifications Change history

	Organization	Commodity	Current Status	Pending Status	Comment	Workflow
		110 - Laboratory Instrument	Approved			
		109 - Chemical Equipment	Approved			
		132 - Vitamins	Forbidden	Pending		Reject Approve
		131 - Vegetal fat	Approved			
		130 - Solvents	Approved			
		129 - Silicones	Approved			
		128 - Preservatives	Approved			
		127 - Polymers	Approved			
		126 - Natural Fragrances	Approved			
		125 - Colorants	Approved			
		124 - Chemicals-Miscellanou	Approved			
		123 - Artificial Fragrances	Approved			
		122 - Animal fat	Forbidden			
		111 - Measurement equipment	Approved			
		MA_CH - Chemicals	Approved			

16 Result(s)

GEOGRAPHICAL COVERAGE

Geographical Regions :

ADDITIONAL INFORMATION DECLARED BY THE SUPPLIER

Commodities :

Comment (Supplier) :

CUSTOMER REFERENCES

Add a reference

[Page] [D] [V] [C] Buyer demo v8.156 ©

This tab lets you:

- Manage the qualification approval statuses of the supplier by organization and by commodity (status change may be submitted to approval depending on configuration)
- Manage the geographical areas served by the supplier
- Manage customer references, either entered by the supplier during registration or later via the Supplier Portal, or entered here by buyers

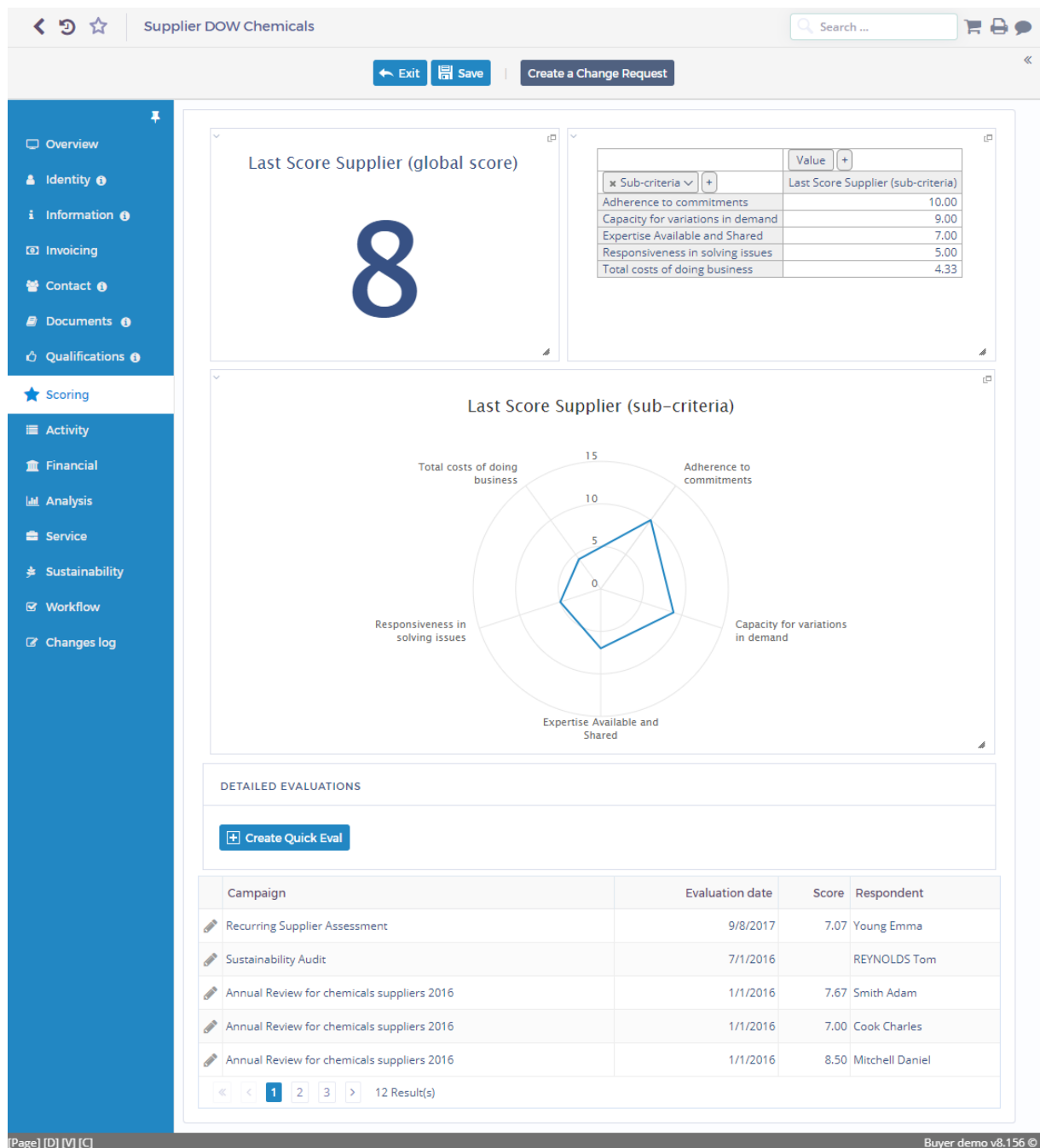
### See also:

*Requesting a Qualification Approval, page 24*

*Modifying or Deleting an Existing Qualification, page 26*

*Approving a New Qualification or a Qualification Status Change, page 27*

### Scoring Tab



This tab shows the last score obtained by the supplier, as well as different visualizations of the score breakdown into sub-criteria (table and radar chart). These scores are displayed real-time.

This tab also lets users carry out spot evaluations of the supplier in order to give feedback on their interaction with that supplier.

The bottom part of the page shows a list of all the spot evaluations conducted relative to the supplier.

### About Supplier Score

The Last Supplier Score (in other words, the Current Supplier Score) can originate from any *Supplier Scoring* type questionnaire, whether used in a spot evaluation or in a supplier scoring campaign.

Which score is the last one is determined based on the questionnaire evaluation period, and more specifically, on the evaluation period end date: the questionnaire that has the most recent evaluation period end date is considered as carrying the last score.

If there happens to be more than one questionnaire with the same “most recent” end date, then the questionnaire with the longest evaluation period will prevail, and then the one with the highest GUID.

Only validated evaluations attached to a closed questionnaire are taken into account.

When the score originates from a scoring campaign, it is computed as the average of all campaign evaluations relative to the supplier. One evaluation is a weighted average of its section, sub section, and question scores.

**See also:**

*Spot Evaluations, page 76*

*Answering the Evaluation Questionnaire, page 76*

*Submitting a Completed Evaluation, page 78*

## Activity Tab

Supplier DOW Chemicals

Search ...

Exit Save Create a Change Request

Overview  
Identity  
Information  
Invoicing  
Contact  
Documents  
Qualifications  
Scoring  
Activity

Financial  
Analysis  
Service  
Sustainability  
Workflow  
Changes log

**SOURCING PROJECT**

	Code	Label	Shortcut
	BPM000198	Polymers - EMEA Cosmetics August 2018	
	BPM000197	TANK Equipment Chemistry Industry	
	BPM000193	Polymers - AMER Cosmetics August 2018	
	BPM000177	Polymères - EMEA Cosmetics	
	BPM000175	Equipment for US Labs - central	

5 Result(s) >> view all

**CONTRACTS**

	Code	Name	Type	End Date	Alert	Validity
	CTR000034	DOW Chemicals NAFTA agreement	Simple Agreement	3/12/2018		
	CTR000033	DOW Chemicals accord EMEA	Simple Agreement	5/12/2018		

2 Result(s) >> view all

**PRODUCTS**

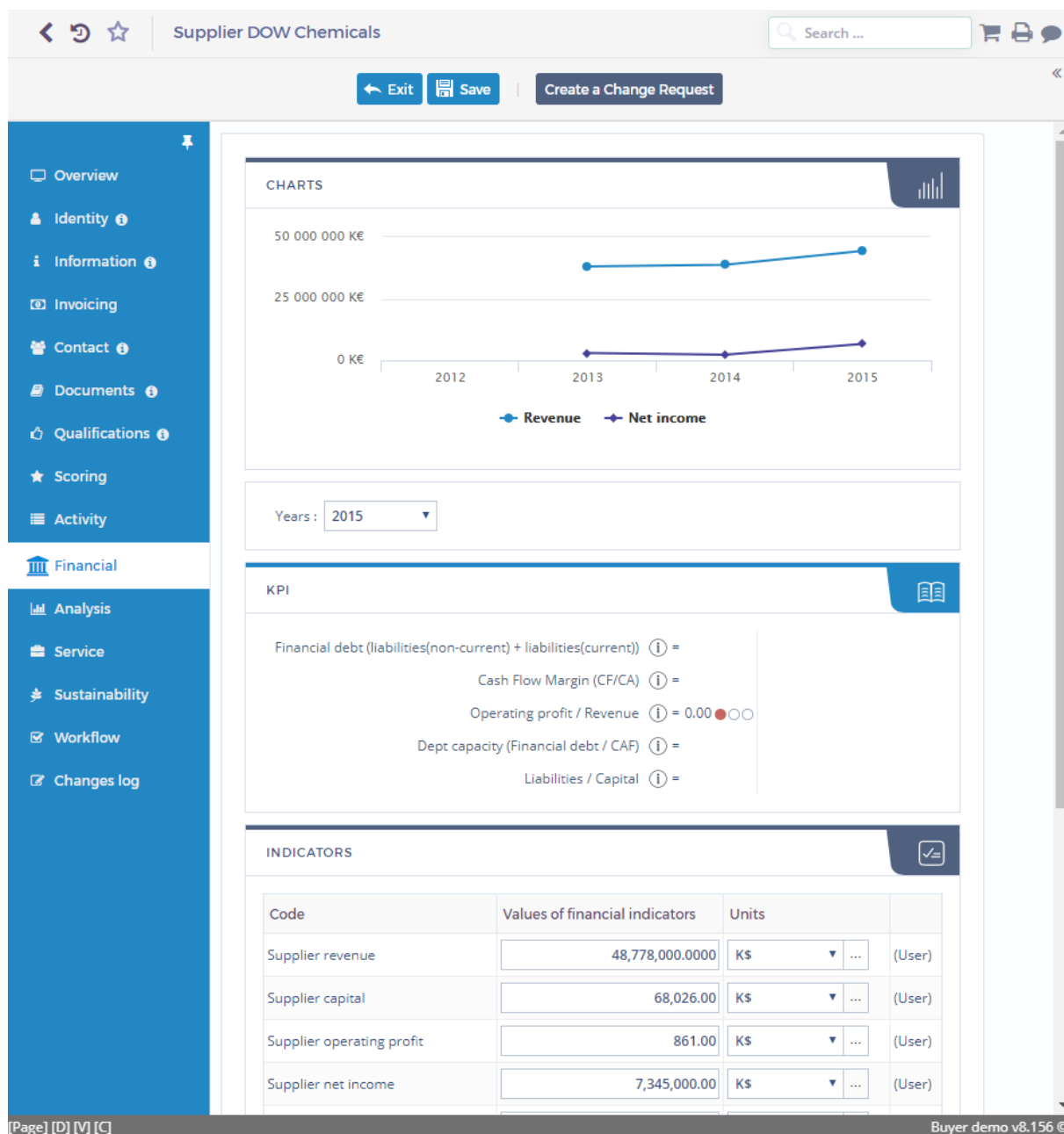
	Product Code	Label	Contract	Price	Currency	Unit	Validity Start Date	Validity End Date	Reviews
	6002	Iuvo Microchannel 5250 Assay Plate	DOW Chemicals NAFTA agreement	226.00	USD	Each	6/12/2016	3/12/2018	<a href="#">Add a review</a>
	6006	Iuvo Chemotaxis Assay Plate	DOW Chemicals NAFTA agreement	310.75	USD	Each	6/12/2016	3/12/2018	

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This tab is auto populated. It presents an overview of the supplier's activity with your company: orders, sourcing processes, items ordered, etc.

It offers quick access to the various listed resources. For each resource type, a *View all* link points to the resource dedicated search page, filtered on the current supplier.

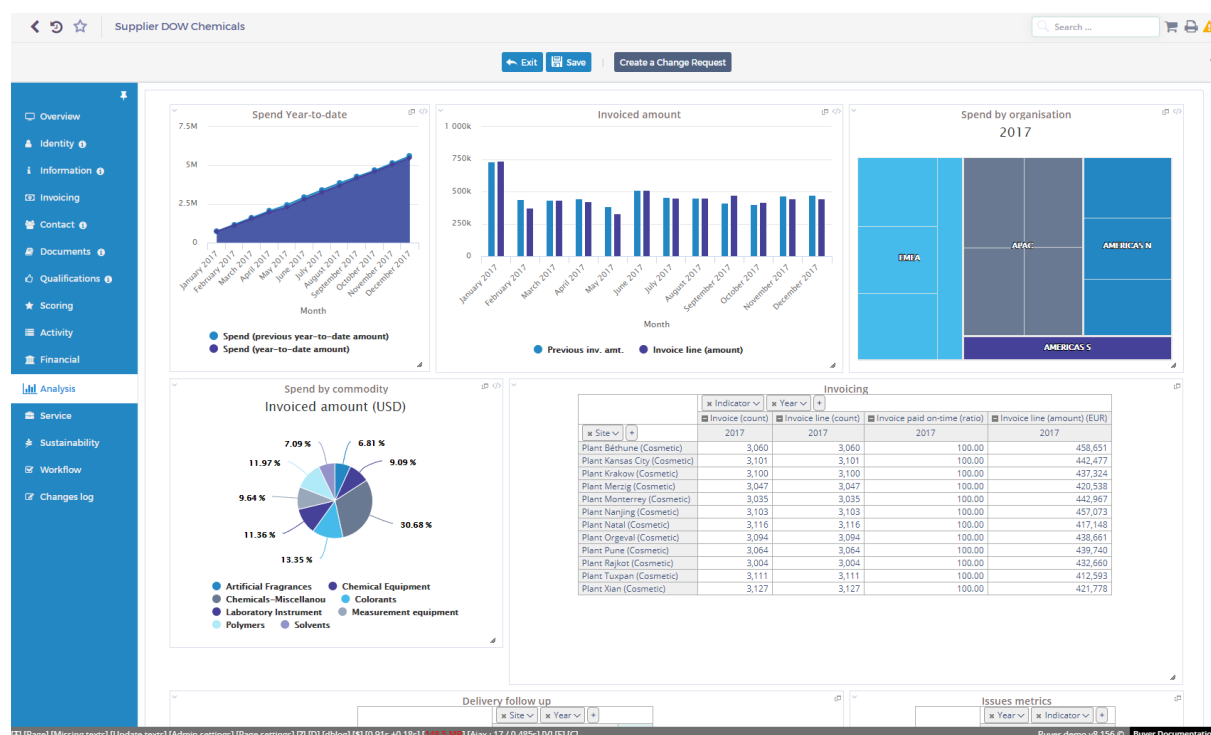
## Financial Tab



This tab lets you enter the supplier's financial results per fiscal year (*Indicators* section). Key Performance Indicators (KPIs) are computed based on entered data.

When data is provided for a period of several years, the top chart shows the evolution of the supplier's turnover and net income.

## Analysis Tab



This tab provides a custom picture of corporate spending with the supplier, enabling you to determine the spending distribution (by commodities, by business units, etc.), spending evolution over time, supplier dependence rate, or other analyses that suit your requirements.

## Services Tab

[Supplier FLAUR CONSULTING GROUP](#)

[Exit](#)
[Save](#)
[Create a Change Request](#)

[Overview](#)
[Identity](#)
[Information](#)
[Contact](#)
[Documents](#)
[Qualifications](#)
[Scoring](#)
[Activity](#)
[Financial](#)
[Analysis](#)

[Service](#)

[Sustainability](#)
[Workflow](#)
[Changes log](#)

SERVICES

[Search](#)

Change Management Consulting (4)	<input type="checkbox"/>
Business Analyst - Information systems	<input checked="" type="checkbox"/>
Business Analyst - Principal	<input checked="" type="checkbox"/>
New Client Process setup - Assist	<input checked="" type="checkbox"/>
Technical or Functional Expertise	<input checked="" type="checkbox"/>
Communication & Marketing Advisory (3)	<input type="checkbox"/>
Graphical Look and Feel design	<input checked="" type="checkbox"/>
Strategic Positioning	<input checked="" type="checkbox"/>
User Interface consultation	<input checked="" type="checkbox"/>
Production (2)	<input type="checkbox"/>
Production Assist	<input checked="" type="checkbox"/>
Workflow and Approvals Consultant	<input checked="" type="checkbox"/>
Program Management (6)	<input type="checkbox"/>
Project Management (6)	<input type="checkbox"/>
Strategic Consulting (2)	<input type="checkbox"/>
Technical Consulting (14)	<input type="checkbox"/>
Training (5)	<input type="checkbox"/>

SKILLS

[Search](#)

Functional skills (0)	Expertise	Normal
Technical skills (0)	Expertise	Normal
Artificial Intelligence	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Databases	<input checked="" type="checkbox"/>	<input type="checkbox"/>
IT	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mainframe	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Multimedia	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Network	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PCs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Servers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Telecom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Technological skills (0)	Expertise	Normal

[Page] [D] [M] [C]

Buyer demo v8.156 ©

The **Services** tab allows you to select the services and skills offered by a supplier. When a request for professional services is issued as part of a sourcing process, this selection will serve to sift candidate suppliers in service requisitions.

## Workflow Tab

< ↺ ☆ Supplier DOW Chemicals  Search ...

← Exit
 Save
Create a Change Request
«

- Overview
- Identity ⓘ
- Information ⓘ
- Invoicing
- Contact ⓘ
- Documents ⓘ
- Qualifications ⓘ
- Scoring
- Activity
- Financial
- Analysis
- Service
- Sustainability
- Workflow
- Changes log

```

graph LR
    Creation[Creation] --> DueDiligence[Due Diligence]
    DueDiligence --> SiteSupplier{Site supplier?}
    SiteSupplier -- no --> APValidation[AP Validation]
    SiteSupplier -- yes --> DocumentsAccurate{Documents accurate?}
    APValidation --> APValidationOK[AP Validation OK]
    DocumentsAccurate -- go --> DocumentsWaiting[Documents waiting for approval]
    DocumentsWaiting --> DocumentsOK[Documents OK]
    APValidationOK --> PurchasingValidation[Purchasing Validation]
    DocumentsOK --> PurchasingValidation[Purchasing Validation]
        
```

#### ADD A COMMENT

Comment

Click or Drag to add files
Send to : 
Save

#### APPROVAL HISTORY

Activity	Name	Delegate to	Created on (your local time)	Validated on (your local time)	State	Initial performer
Purchasing Validation	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	<span style="color: green;">○ ○ ●</span>	ADMIN Clarity
Documents OK	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	<span style="color: green;">○ ○ ●</span>	ADMIN Clarity
AP Validation OK	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	<span style="color: green;">○ ○ ●</span>	ADMIN Clarity
Due Diligence	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	<span style="color: green;">○ ○ ●</span>	ADMIN Clarity
Creation	ADMIN Clarity		4/22/2015 4:16:47 PM	4/22/2015 4:16:47 PM	<span style="color: green;">○ ○ ●</span>	ADMIN Clarity
5 Result(s)						

#### PREVIOUS APPROVALS & REFUSAL ➤

#### MAIL HISTORY ➤

This tab lets you track the progression of the Supplier record within the validation workflow.

**See also:**

*Activating a Supplier record, page 34*



## Change Log Tab

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↺
☆

Supplier DOW Chemicals

🛒
🖨️
💬

↶ Exit
💾 Save
Create a Change Request

Overview
Identity
Information
Invoicing
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Service
Sustainability
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Changes log

	Created on	Requester	Reason for change request	Status	Modified on	Approver
	6/28/2016	Emma Young	update of payment conditions and gov id.	Approved	6/28/2016	Emma Young
	6/17/2016	Emma Young	New banking information received from supplier	Approved	6/17/2016	Emma Young

2 Result(s)

When supplier data is protected by way of a change control process, this data can only be edited by creating a Change Request.

All Change Requests, past or on-going, are listed in the *Change Log* tab and can be opened therefrom. For each request, the list shows the name of the requester, the request motives, its status, the date it was last modified, and the name of its approver.

**See also:**

*Change Requests, page 36*

*Managing Supplier Change Requests, page 37*